TRENDS

Consumer Attitudes
& The Supermarket 1990

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TRENDS

Consumer Attitudes & The Supermarket 1990

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INTRODUCTION

The current study, the nineteenth in a series of consumer attitude surveys, is designed to identify the changing needs and priorities of the American consumer. *Trends—Consumer Attitudes and the Supermarket, 1990* explores many of the major issues from previous years, while investigating new issues that are likely to affect shoppers in the future. The survey is conducted in January of each year.

The main topics:

- Expectations and evaluations of supermarket performance.
- Consumer expenditures in supermarkets and ways that shoppers try to save money.
- Frequency of trips to the supermarket, as well as store switching and alternatives to the supermarket.
- Store products and services.
- Consumer attitudes toward nutrition.
- Consumer attitudes toward food safety.

In addition to nutrition and food safety information gathered in previous years, the 1990 survey explored in greater detail:

- The role government and consumers can play to ensure food safety.
- Shoppers' attention to nutrition.

The issues first probed in the 1990 survey:

- Adequacy of product labeling information.
- Consumer attitudes toward food manufacturers' health claims.
- Whom shoppers believe should be responsible for ensuring the accuracy of manufacturers' health messages.

In the methodology section of this report is a demographic profile of the total sample, including weighted and unweighted percentages of major demographic groups.

Study Design

The data for this survey are based on telephone interviews with a representative, nationwide sample of 1,005 male and female supermarket shoppers, conducted in January 1990. The sample was composed of 60 percent female and 40 percent male heads of households. It was subsequently weighted to an 80 percent female and 20 percent male ratio to maintain comparability with previous studies in the *Trends* series.

A Note on the Tables

Directly beneath the title of each table is a description of the base — that is, the group of respondents for each question. The exact number in each base group, either in total or for shopper categories, is provided where appropriate. The percentages in each table are calculated using this base number. These percentages may not add up to 100 due to rounding or the use of multiple responses.

In all comparisons among categories surveyed in 1990, any noted differences are statistically significant. For year-to-year comparisons, whether for types of consumers or totals, changes are simply noted and are not subject to statistical comparison, unless otherwise stated.

For some tables, the response categories are presented both separately (e.g., very important, somewhat important) and combined (e.g., very important or somewhat important). In some instances, the separate percentages may not add up to the combined ones due to rounding.

For each table the wording of the question appears as it was asked. Any changes in wording from previous years are noted in the table.

SURVEY HIGHLIGHTS

The following is an overview of some of the most important findings of the January 1990 *Trends* study.

Expectations and Evaluations of Supermarket Performance

- Overall, shoppers continue to report high levels of satisfaction with the performance of their principal supermarket. On a scale of one to 10, where one means poor and 10 means excellent, the average rating is 7.9.
- When selecting a supermarket, shoppers continue to care most about quality produce (98 percent), good variety or wide selection (97 percent), and quality meat (96 percent). Good, low prices are now tied with quality meat as an important factor in supermarket selection (96 percent; up significantly from 92 percent in 1989). Also important are courteous, friendly employees (94 percent), readable and accurate shelf tags (92 percent), and a convenient location (92 percent).
- Good, low prices (66 percent) and readable and accurate shelf tags (70 percent) are the only two of the seven most important factors for which fewer than eight in 10 shoppers rate their supermarket's performance as good or excellent. Shoppers are significantly less likely in 1990 than in 1989 (66 percent vs. 71 percent) to say that their supermarket performs well with respect to good, low prices.

Nutrition

- Almost two-thirds of all shoppers indicate that there is room for improvement in their diets. To ensure that their diet is healthy, shoppers say they eat *more* fruits and vegetables (57 percent); *less* red meat (34 percent), fats (27 percent) and sugar (19 percent); and *more* chicken (19 percent), fish (18 percent) or fiber (16 percent).
- Nearly all shoppers value nutrition as a factor when shopping for food (96 percent)—particularly among older shoppers and nonworking women.
- About nine in 10 shoppers pay at least some attention to the nutritional content of the food they eat (90 percent). The nutritional items that draw the greatest attention are those about which shoppers express the greatest concern. Most attention is given to low fat content (40 percent) or cholesterol levels (39 percent). Shoppers also pay attention to the salt content of foods (28 percent) and foods low in calories (21 percent).
- More than half of all shoppers are very concerned about the nutritional content of what they eat (55 percent). Low fat content has emerged as the primary nutritional concern (46 percent, up from 29 percent in 1989), followed by cholesterol levels (44 percent) and salt content (30 percent). Shoppers identified fat as the most serious health hazard (54 percent, down from 58 percent in 1989), followed by cholesterol (47 percent, down from 61 percent), and salt (34 percent, down from 44 percent).
- About one in five shoppers report that someone in their household is on a medically restricted diet. These shoppers are among those most likely to exhibit nutritional concerns, and to have changed their food preparation behavior.
- To ensure that the food they eat is nutritious, shoppers place the greatest reliance on themselves (36 percent), followed by the government (22 percent) then manufacturers (21 percent). This is in contrast to 1989, when manufacturers, individuals and the government were seen as equally responsible.
- More than nine in 10 shoppers read food labels at least sometimes for expiration dates when they shop (92 percent). More than eight in 10 read the label for ingredient (85 percent) or nutrition (82 percent) information. For *first-time purchases only,* nearly nine in 10 read the label for ingredient (88 percent) or nutrition information (87 percent).
- One-half of those surveyed believe that labels provide them with at least most of the information they need to plan meals and address dietary and health concerns. One-half say labels do not.
- For the first time, shoppers were queried about manufacturers' statements about the health-related benefits and risks associated with their food products. More than half of all shoppers find these statements at least somewhat believable (60 percent) and nearly two-thirds (73 percent) report that these statements are at least somewhat influential in their decision to purchase a product. Shoppers who find manufacturers' statements less than fully believable say this is because they

feel the statements don't tell the whole story (61 percent) or not truthful and accurate (49 percent).

- To ensure that manufacturers' health messages are accurate, shoppers rely primarily on the government (40 percent) or manufacturers (34 percent). Nearly two-thirds of all shoppers believe that manufacturers' statements currently require government approval (64 percent).

Consumer Attitudes Toward Food Safety

- Nine in 10 shoppers consider product safety to be at least somewhat important when shopping for food (91 percent). About eight in 10 are at least mostly confident in the safety of the food they buy in their supermarket (79 percent)—a significant increase from 1989 surveys using this question in which the confidence level dropped to as low as 65 percent.
- When asked about the greatest threats to the safety of the food they eat, shoppers volunteered spoilage and germs (29 percent); pesticides, residues, insecticides and herbicides (19 percent); chemicals (16 percent); improper packaging (16 percent); and tampering (14 percent).
- In an aided-response question, shoppers are most likely to view pesticide residues as a serious hazard (80 percent) followed by antibiotics and hormones in poultry and livestock (56 percent). Consumer concern over pesticides remained unchanged from 1989 to 1990, while the percentage viewing antibiotics and hormones a serious hazard dropped by five points.
- Shoppers continue to rely primarily on themselves to ensure that the products they buy are safe (35 percent), although this number has dropped by six percentage points since 1989. Shoppers also rely on government (27 percent) and manufacturers (19 percent)—an increase from the 1989 figures (23 percent and 14 percent, respectively).
- Shoppers expect the government to increase their confidence in the safety of the food supply primarily through safety inspections (42 percent) and enforcement of government safety standards (31 percent). Shoppers feel that supermarkets could enhance confidence in food safety through safety inspections (19 percent), proper handling (15 percent), removal of spoiled items (14 percent), and cleanliness standards for employees (14 percent).
- When asked what steps they took at home to ensure the safety of foods, shoppers mentioned the following most often: proper refrigeration (58 percent), proper storage (35 percent), checking expiration dates (26 percent) and washing/cleaning foods (25 percent).
- Nearly half of all shoppers (46 percent) have sought information about food safety in the past year, up from 37 percent in 1989. Shoppers say they would turn to government (28 percent) and consumer organizations (22 percent) for more information.

Consumer Expenditures In Supermarkets and Money-Saving Methods

- As in 1989, households spend an average of $74 per week on groceries. The average per-person weekly grocery expenses have also remained stable at $29.
- Nearly four in 10 shoppers use price-off coupons (37 percent) or look in the newspaper for grocery specials pretty much every time they shop (38 percent), reversing the declines in price-conscious behavior noted in 1989.

Shopping Habits and Behavior

- Consistent with prior years, shoppers make an average of just over two (2.2) visits to the supermarket per week.
- In the past year, 27 percent of all shoppers have switched grocery stores. This is consistent with the 1989 figure, when 29 percent of all shoppers were store switchers. The main reasons cited for switching: a convenient location (50 percent) or better and lower prices (40 percent).
- As was the case last year, about one in 10 shoppers use the supermarket as a source of takeout food, up slightly from 1989.

Store Products and Services

- Consistent with 1989, more than nine in 10 shoppers report that their supermarket carries foods designed especially for microwave cooking (93 percent). Equally as many report that their primary store carriers private label or store brands (93 percent). Another eight in 10 report that their supermarket features partially prepared foods (83 percent), or a delicatessen and carryout section (80 percent). The reported availability of gourmet or specialty foods (56 percent) and photo finishing (49 percent) has declined.
- The products or services shoppers most frequently buy are private label or store brands (37 percent), the delicatessen or other carryout food items (29 percent), microwave foods (26 percent), and unpackaged or bulk food (24 percent). Since 1989, use of unpackaged or bulk foods has increased by seven percentage points.
- For shoppers whose stores lack these products or services, private label or store brands (30 percent) and postage stamps (26 percent) top the list of items that they anticipate the greatest frequency of use.

CHAPTER 1

How Consumers View the Supermarket

Expectations and Supermarket Performance

In 1990, for the fourth consecutive year, *Trends* investigated the factors most important to shoppers when they select a supermarket (see Table 1). Shoppers are consistent from year to year with respect to their ratings of the top features. As in prior years, "quality produce (fruits and vegetables)" ranks in the top position; "good variety or wide selection" second; and "quality meat" third. For the first time since 1988, "good, low prices" is tied with "quality meat" for third.

Three of the top four factors relate to product offerings rather than services or store features. However, at least nine out of 10 shoppers consider the following features to be somewhat or very important: courteous, friendly employees; readable and accurate shelf tags; and a convenient location.

Of the remaining characteristics, at least two in three shoppers rated as somewhat or very important a fast checkout; items on sale or money-saving specials; nutrition and health information available for shoppers; and a convenient store layout. Slightly fewer rated fresh food sections, such as a deli or bakery, as very or somewhat important.

Fewer than two in three shoppers rated four features as very or somewhat important: a fresh seafood section; private label or store brands; 24-hour operation; and a pharmacy.

Between 1989 and 1990 importance ratings for most items remained stable except for two, which registered four percentage-point changes from 1989 to 1990: good, low prices increased from 92 percent to 96 percent; and fresh food sections, such as a deli or bakery, decreased from 76 percent to 72 percent. This decline, however, may be due to a change in question wording. The importance of a fresh seafood section was asked as a separate item in 1990 and incorporated with a deli or bakery in prior years.

Nearly all men and women rank quality produce and good variety at the top of their store selection list.

Compared with *nonworking* women, fewer men view the following factors as somewhat or very important:

- Courteous, friendly employees.
- Items on sale or money-saving specials.
- Nutrition and health information available for shoppers.
- Private label/store brands.
- Pharmacy in store.
- Convenient store layout.
- Convenient location.
- Readable, accurate shelf tags.
- Good, low prices.

Compared with *all* women, men are less likely to rate as somewhat or very important:

- Good, low prices.
- Convenient location.
- Convenient store layout.
- Nutrition and health, information available to shoppers.
- Items on sale or money saving specials.
- Courteous, friendly employees.

Men attach greater importance than nonworking women to only one store feature: 24-hour operation.

By age, few consistent differences emerge (see Table 3). As a group, 18- to 24-year-olds differ from their older counterparts. Larger numbers of these younger shoppers consider 24-hour operation to be somewhat or very important; on the other hand, fewer of these shoppers regard a convenient store layout as very or somewhat important.

Shoppers aged 65 or more also may be differentiated from those in other age groups. Fewer senior shoppers rate as somewhat or very important either 24-hour operation or a fast checkout. Seniors attach somewhat more importance to private label or store brands than younger groups.

As in earlier years, *Trends* investigated supermarkets' responsiveness to shopper needs by asking shoppers to rate their principal supermarket on the same list of features rated for importance (see Table 1). While their supermarket performance ratings fall somewhat short of their importance ratings, seven features are rated good or excellent by at least four shoppers in five:

- Good variety or wide selection (89 percent).*
- Quality produce (fruits and vegetables) (88 percent).*
- Convenient location (88 percent).
- Courteous, friendly employees (87 percent).*
- Fresh food sections, such as a deli or bakery (87 percent).
- Quality meat (86 percent).*
- Convenient store layout (83 percent).

*Among top five in importance when selecting a supermarket.

Notably, of the features listed above, the four marked with an asterisk are also among the top five in importance when selecting a supermarket. The feature whose absence from the list is most conspicuous is "good, low prices." Whereas 96 percent of shoppers rate this item as somewhat or very important, only 66 percent rate their supermarket as good or excellent in this respect. The proportion of shoppers who rate their supermarket as good or excellent on this feature has dropped by five percentage points since 1989.

Larger proportions of 1990 than 1989 shoppers rate their supermarket as excellent or good on two features: nutrition and health information available for shoppers, and fresh food sections, such as a deli or bakery. These differences may reflect a methodological change. For the first time, only those shoppers whose supermarket was known to have these features were asked to rate its importance. Additionally, seafood was excluded from "fresh food sections" and asked as a separate item.

Table 1 **How Well Supermarkets Meet Consumer Expectations: 1987-1990**

Q.: In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.

Q.: Now I'm going to read the same list of factors, and ask you to tell me how well the supermarket in which you usually shop does on each one. For each factor, please tell me whether your supermarket does an excellent, good, fair or poor job of having (READ EACH ITEM).

Base: The shopping public

		Very or Somewhat Important				Excellent or Good Rating			
		1987	1988	1989	**1990**	1987	1988	1989	**1990**
Quality produce (fruits and vegetables)	%	98	98	98	**98**	85	85	85	**88**
Good variety or wide selection	%	96	96	96	**97**	88	87	86	**89**
Quality meat	%	96	94	95	**96**	82	85	84	**86**
Good, low prices	%	93	94	92	**96**	73	72	71	**66**
Courteous, friendly employees	%	93	93	94	**94**	87	87	85	**87**
Readable and accurate shelf tags	%	90	92	92	**92**	73	70	72	**70**
Convenient location	%	92	92	91	**92**	87	88	89	**88**
Fast checkout	%	89	88	88	**89**	70	70	71	**69**
Items on sale, or money-saving specials	%	85	86	84	**85**	78	79	77	**77**
Nutrition and health information available for shoppers*	%	75	74	84	**84**	50	50	55	**75**
Convenient store layout	%	79	78	76	**77**	83	85	83	**83**
Fresh food sections, such as a deli or bakery**	%	72	76	76	**72**	75	77	81	**87**
Fresh seafood section*	%	x	x	x	**63**	x	x	x	**75**
Private label/store brands*	%	x	x	x	**54**	x	x	x	**74**
24-hour operation*	%	x	x	x	**45**	x	x	x	**N/A**
Pharmacy*	%	x	x	x	**37**	x	x	x	**58**

*In 1990, respondents were asked to rate their supermarket's performance only if it had the specified feature. The methodology may account for a change in the rating from 1989 to 1990.

**In 1987, shoppers were asked to rate "specialty sections, such as a deli, bakery, or fresh fish." In 1988 and 1989, shoppers were asked to rate "specialty food sections, such as a deli, bakery or fresh fish."

Table 2 **Importance of Supermarket Features, by Sex**

Q.: In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.

Base: The shopping public

		Jan. 1990 Total	Men	Women	
				Working	Nonworking
Base		**1,005**	401	312	291
Very or Somewhat Important					
Quality produce (fruits and vegetables)	%	**98**	97	98	99
Good variety or wide selection	%	**97**	97	97	98
Quality meat	%	**96**	94	97	96
Good, low prices	%	**96**	94	97	97
Courteous, friendly employees	%	**94**	90	93	96
Readable and accurate shelf tags	%	**92**	89	92	93
Convenient location	%	**92**	85	93	94
Fast checkout	%	**89**	88	90	88
Items on sale, or money-saving specials	%	**85**	78	83	92
Nutrition and health information available for shoppers	%	**84**	77	83	88
Convenient store layout	%	**77**	65	80	79
Fresh food sections, such as a deli or a bakery*	%	**72**	70	77	69
Fresh seafood section	%	**63**	62	62	64
Private label/store brands	%	**54**	51	52	58
24-hour operation	%	**45**	48	48	40
Pharmacy	%	**37**	32	35	40

*In 1987, shoppers were asked to rate "specialty sections, such as a deli, bakery or fresh fish." In 1988 and 1989, shoppers were asked to rate "specialty food sections, such as a deli, bakery or fresh fish."

Table 3 **Importance of Supermarket Features, by Age**

Q.: In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.

Base: The shopping public

		Jan. 1990 Total	Age				
			18-24	25-39	40-49	50-64	65+
Base		**1,005**	75	383	205	181	149
Very or Somewhat Important							
Quality produce (fruits and vegetables)	%	**98**	99	98	98	97	100
Good variety or wide selection	%	**97**	100	97	98	95	97
Good, low prices	%	**96**	99	96	98	97	94
Quality meat	%	**96**	97	94	97	98	96
Courteous, friendly employees	%	**94**	91	93	92	96	97
Convenient location	%	**92**	88	93	93	89	90
Readable and accurate shelf tags	%	**92**	93	91	90	92	93
Fast checkout	%	**89**	85	92	89	90	82
Items on sale, or money-saving specials	%	**85**	87	84	87	83	88
Nutrition and health information available for shoppers	%	**84**	84	82	88	82	85
Convenient store layout	%	**77**	66	76	79	81	75
Fresh food sections, such as a deli or bakery*	%	**72**	70	74	76	69	66
Fresh seafood section	%	**63**	61	61	65	62	67
Private label/store brands	%	**54**	56	52	52	56	61
24-hour operation	%	**45**	62	52	43	41	27
Pharmacy	%	**37**	39	37	32	39	39

*In 1987, shoppers were asked to rate specialty sections, such as a deli, bakery or fresh fish." In 1988 and 1989, shoppers were asked to rate "specialty food sections, such as a deli, bakery or fresh fish."

Table 4 **Importance of Supermarket Features, by Household Size**

Q.: In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.

Base: The shopping public

		Jan. 1990 Total	Household Size				
			One	Two	Three	Four	Five Or More
Base		**1,005**	169	340	200	174	119
Very or Somewhat Important							
Quality produce (fruits and vegetables)	%	**98**	99	98	99	98	98
Good variety or wide selection	%	**97**	97	98	97	98	98
Good, low prices	%	**96**	90	97	98	98	98
Quality meat	%	**96**	96	95	97	96	96
Courteous, friendly employees	%	**94**	95	93	95	94	92
Convenient location	%	**92**	93	90	94	92	92
Readable and accurate shelf tags	%	**92**	89	92	92	92	94
Fast checkout	%	**89**	85	89	90	91	89
Items on sale, or money-saving specials	%	**85**	79	85	87	87	91
Nutrition and health information available for shoppers	%	**84**	87	80	83	88	83
Convenient store layout	%	**77**	75	74	76	79	82
Fresh food sections, such as a deli or bakery*	%	**72**	74	72	71	79	64
Fresh seafood section	%	**63**	62	65	59	68	57
Private label/store brands	%	**54**	51	54	53	58	55
24-hour operation	%	**45**	43	41	40	53	55
Pharmacy	%	**37**	34	36	34	45	33

*In 1987, shoppers were asked to rate "specialty sections, such as a deli, bakery or fresh fish." In 1988 and 1989, shoppers were asked to rate "specialty food sections, such as a deli, bakery or fresh fish."

Overall Satisfaction With Supermarkets

In 1990 *Trends* continued to examine shoppers' general level of satisfaction with their supermarkets. As an overall measure of satisfaction, shoppers were asked to rate their principal supermarket on a scale of one to 10, where "one" indicates their supermarket is doing a poor job and "10" an excellent job.

From 1988 to 1990, the mean rating of 7.9 was unchanged, indicating a consistently high level of satisfaction with supermarket performance (see Table 5). However, the percentage who rated their supermarket "nine" or "10" dropped by three points, from 32 percent to 29 percent.

Several differences emerge among population subgroups with respect to their levels of satisfaction. The most important:

- Compared with men, women—particularly those who are not working—are more likely to rate their principal supermarket a "nine" or "10."
- Shoppers in childless households are more likely than those in households with children to rate their supermarket highly.
- Compared with shoppers from households of three or more persons, those from one-person households give higher ratings to their primary supermarket.
- A larger proportion of shoppers aged 50 and older rate their supermarket "nine" or "10," compared with those aged 18 to 49.
- Compared with shoppers with some college, those with a high school education or less are more likely to assign high ratings to their supermarket.
- Shoppers from households with an annual income of $15,000 or less rate their primary supermarket more favorably than those from households with higher incomes.

Table 5 **Consumers Evaluate Their Principal Supermarket: 1987-1990**

Q.: All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to 10, where "one" means it is doing a poor job, and "10" means it is doing an excellent job. Use any number between and including one to 10.

Base: The shopping public

	Average Rating (1 to 10 Scale)				Percentage Rating Supermarket 9 or 10			
	1987	1988	1989	**1990**	1987	1988	1989	**1990**
					%	%	%	%
Total	7.8	7.9	7.9	**7.9**	31	32	32	**29**
Sex								
Men	7.6	7.7	7.7	**7.7**	24	29	25	**22**
Women	7.9	7.9	7.9	**7.9**	32	32	33	**31**
Working	7.7	7.7	7.9	**7.8**	26	26	31	**28**
Nonworking	8.1	8.2	7.9	**8.1**	38	41	36	**35**
Type of Household								
With Children	7.7	7.8	7.8	**7.7**	26	29	30	**24**
No Children	8.0	8.0	8.0	**8.0**	35	34	33	**33**
Size of Household								
1	8.1	8.1	8.0	**8.1**	40	40	38	**37**
2	7.9	7.9	8.0	**8.0**	33	30	31	**33**
3	7.8	7.9	7.8	**7.8**	26	30	32	**26**
4	7.7	8.0	7.7	**7.7**	30	36	29	**23**
5 or more	7.9	7.5	7.8	**7.7**	26	23	31	**25**
Age								
18-24	7.3	7.9	7.7	**7.8**	16	23	21	**28**
25-39	7.6	7.8	7.8	**7.7**	21	28	27	**21**
40-49	7.9	7.6	7.8	**7.8**	34	27	35	**27**
50-64	8.2	8.1	8.0	**8.1**	40	36	35	**38**
65 and older	8.3	8.3	8.2	**8.3**	52	51	43	**43**

Table 6 **Consumers Evaluate Their Principal Supermarket**

Q.: All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to 10, where "one" means it is doing a poor job, and "10" means it is doing an excellent job. Use any number between and including one to 10.

Base: The shopping public

	1990 Average Rating (1 to 10 Scale)	1990 Percentage Rating Supermarket 9 or 10
		%
Total	7.9	29
Income		
$15,000 or less	8.0	39
$15,001-$25,000	7.9	29
$25,001-$35,000	7.7	24
$35,001-$50,000	7.9	23
$50,001 or more	7.7	25
Education		
High school or less	8.0	36
Some college/college graduate	7.7	21

CHAPTER 2

Spending and Saving Money

The Weekly Grocery Bill

From January 1989 to January 1990, average weekly household grocery expenses remained stable at $74 (see Table 7). The proportion of shoppers who estimate their weekly grocery bill to be $61 to $100 increased slightly during the past year, while the proportion spending more than $100 decreased by one percentage point.

Changes in weekly family grocery expenses varied for households of different sizes (see Table 8). The bills for one-person, two-person and four-person households effectively did not change over the past year. Shoppers in three-person households reported a slight increase, from $80 to $82. Only for households of five or more did grocery expenses decrease significantly, by $6.

Average per-person weekly grocery expenses for all shoppers did not increase from the $29 reported in 1989 (see Table 9)—a pattern that largely held among demographic subgroups. However, consistent with previous years, the average per-person weekly grocery bill continues to be lower for families with children than for childless households—and generally to decline as household size increases. Over the past year, per-person expenses have increased modestly in the East and decreased modestly in the West.

Table 7 **Weekly Family Grocery Expenses: 1981-1990**

Q.: About how much do you spend each week on groceries for your family?

Base: The shopping public

	Total									
	Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	**Jan. 1990**
	%	%	%	%	%	%	%	%	%	**%**
$0-$40	29	30	28	23	23	19	21	23	21	**21**
$41-$60	29	25	29	29	27	28	26	25	24	**24**
$61-$100	31	30	33	34	34	38	37	38	37	**39**
$101 and over	6	8	9	9	12	13	12	11	14	**13**
Not sure/no answer/refused	N/A	7	1	4	4	3	3	3	5	**3**
Average weekly grocery expenses	$55	$58	$62	$64	$68	$74	$72	$71	$74	**$74**

N/A = Not available in 1981.
May not add to 100 percent due to rounding.

Table 8 Weekly Family Grocery Expenses, by Size of Household: 1982-1990

Q.: About how much do you spend each week on groceries for your family?

Base: The shopping public

	Total								
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	**Jan. 1990**
	$	$	$	$	$	$	$	$	**$**
Size of Household									
1	33	36	40	40	41	33	38	40	**39**
2	51	54	59	58	62	58	61	63	**63**
3	70*	72*	71	76	76	77	74	80	**82**
4	70*	72*	80	85	84	85	88	90	**91**
5 or more	90	85	82	92	103	104	98	109	**103**

*Expenses for 1982 and 1983 are combined for three- and four-person households.

Table 9 Average Per-Person Weekly Grocery Expenses: 1982-1990*

Base: The shopping public

	Total								
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	**Jan. 1990**
	$	$	$	$	$	$	$	$	**$**
Total	21	22	23	24	27	24	26	29	**29**
Married									
One spouse at home	20	20	22	23	25	23	24	26	**26**
Two wage earners	22	22	23	23	26	25	25	26	**28**
Type of Household									
With children	19	19	19	21	21	21	22	23	**22**
No children	25	28	28	29	32	28	31	33	**34**
Size of Household									
1	33	36	40	40	41	33	38	40	**39**
2	26	27	29	29	31	27	29	31	**32**
3-4	20	21	22	23	23	23	23	25	**25**
5 or more	17	16	15	17	19	17	17	19	**18**
Region									
East	23	22	23	25	28	25	26	30	**33**
Midwest	20	20	22	21	25	22	25	26	**26**
South	20	24	23	24	26	25	26	28	**28**
West	23	24	24	26	27	24	29	31	**28**

*Calculated from average weekly grocery expenses and household size. Where respondents couldn't provide data, they were omitted from the calculation.

Money-Saving Measures

To economize, shoppers continue to prefer price-off coupons and looking in the newspaper for grocery specials (see Table 10).

Shoppers may be differentiated by their use of money-saving measures (see Table 11). Women—particularly nonworking ones—are consistently more price-conscious than men. Older shoppers take more steps to economize than do younger ones. Household income is related to cost concerns: shoppers from lower income households more frequently exhibit money-saving behaviors than do those from more affluent ones. These and other differences are detailed below.

Look in the Newspaper for Grocery Specials

- Nonworking women are more likely to scan the newspaper for grocery specials than working women or men.
- Shoppers aged 50 or older are more likely to practice this economizing measure than younger ones.
- Shoppers whose 1989 household incomes fell below $25,000 are more likely to practice this measure than shoppers whose incomes are higher.
- Shoppers from nonmetropolitan areas or areas of 1 million and over are more likely to look in the newspaper for grocery specials than those from metropolitan areas of less than 1 million.

Use Price-Off Coupons

- Nonworking women are the most likely to use coupons, and men are the least likely.
- By age, shoppers 40 to 49 years old are least likely to use price-off coupons.
- Households earning more than $50,000 are less likely to use coupons than households with lower incomes.
- Shoppers in the West are less likely than shoppers elsewhere to use coupons.
- Shoppers from metropolitan areas of 1 million or over are more likely than are those from smaller areas to use coupons.
- Shoppers from one-person households are less likely to use coupons than are shoppers from larger households.

Compare Prices at Different Supermarkets

- Men are less likely than women to compare prices at different supermarkets.
- Shoppers aged 65 or older are more likely than younger ones to compare prices at different supermarkets.
- As household incomes decline, shoppers are more likely to compare prices at different supermarkets. Households earning less than $25,000 were more likely to compare prices than households earning more.
- Shoppers with a high school education or less more frequently compare prices at different supermarkets than do college-educated shoppers.
- Shoppers from one-person households are less likely to compare prices than are those from households of four or more persons.

Go to Supermarkets Other Than Your Principal One for Advertised Specials

- Shoppers whose 1989 household incomes were $15,000 or less are more likely to go to a different supermarket for advertised specials than those whose household incomes exceeded $25,000.
- Shoppers from the Midwest are less likely than those from other regions to seek advertised specials at different supermarkets.
- Shoppers with a high school education or less are more likely than others to shop for advertised specials.
- Relative to shoppers from households of two or more, shoppers from one-person households are less likely to shop around for advertised specials.

Table 10

How Often Shoppers Use Supermarket Specials, Coupons and Price Comparisons: 1982-1990

Q.: How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally, or never?

Base: The shopping public

		1982	1983	1984	1985	1986	1987	1988	1989	1990				
		Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	**Pretty Much Every Time**	Fairly Often	Only Occa-sion-ally	Never	Not Sure
Use price-off coupons	%	39	38	39	30	39	37	40	35	**37**	20	30	14	0
Look in the newspaper for grocery specials	%	50	52	49	41	40	**	42	34	**38**	17	25	20	0
Compare prices at different supermarkets	%	32	30	29	27	25	23	26	23	**24**	21	32	23	*
Go to super-markets other than your principal one for advertised specials	%	16	13	12	10	9	12	12	12	**10**	18	44	28	*

*Less than 0.5 percent.

**Not reported due to data anomoly.

Table 11

How Shopper Subgroups Vary in Their Use of Supermarket Specials, Coupons and Price Comparisons

Q.: How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally, or never?

Base: The shopping public

	Jan. 1990 Base		Look in the Newspaper for Grocery Specials	Use Price-off Coupons	Compare Prices at Different Supermarkets	Go to Supermarkets Other Than Your Principal One for Advertised Specials
Pretty Much Every Time						
Total	1,005	%	38	37	24	10
Sex						
Men	401	%	27	25	16	10
Women	604	%	40	40	26	10
Working	312	%	37	33	21	8
Nonworking	291	%	44	47	32	12
Age						
18-24	75	%	30	39	21	7
25-39	383	%	31	37	22	8
40-49	205	%	38	32	21	12
50-64	181	%	42	37	25	11
65 and over	149	%	51	44	35	11
Income						
$15,000 or less	185	%	50	41	33	17
$15,001-$25,000	206	%	43	42	32	11
$25,001-$35,000	196	%	28	33	20	8
$35,001-$50,000	190	%	30	37	17	7
$50,001 or more	151	%	31	27	14	6
Region						
East	255	%	41	42	20	12
Midwest	283	%	36	35	21	7
South	315	%	40	37	28	11
West	152	%	32	30	27	10
Population Density						
Nonmetropolitan	274	%	41	33	27	12
Metropolitan						
Under 1 million	375	%	33	35	25	11
1 million or over	356	%	40	42	21	8
Education						
High school or less	516	%	41	40	28	12
Some college/ college graduate	484	%	34	33	20	7
Size of Household						
1	169	%	39	30	19	6
2	340	%	37	39	22	10
3	200	%	39	37	25	11
4	174	%	33	40	29	11
5 or more	119	%	44	38	29	12

CHAPTER 3

Shopping Patterns

Switching Stores

For the second year, *Trends* investigated store switching among shoppers. When asked if they had switched stores in the past year, approximately seven shoppers in 10 said they had not (see Table 12). This proportion is in keeping with that reported in 1989.

Certain groups of shoppers are more likely than others to have switched stores in the past year: Shoppers aged 49 or less are more likely than those who are 50 or older; switching declines slightly as household income rises; and shoppers in the East and Midwest seem somewhat more loyal than shoppers in the South and West. Notably, men and women are equally likely to have switched stores.

The shoppers who had changed stores mentioned the following as the predominant reasons (see Table 13):

- New store is closer/more conveniently located (50 percent).
- Better, lower prices (40 percent).
- More variety/selection (28 percent).
- Better meat (10 percent).
- Better produce (10 percent).

These were also the five most important factors in 1989 (see Table 1).

Table 12 **Switching Stores**

Q.: During the past year have you switched grocery stores?

Base: The shopping public

		Jan. 1989 Yes	Jan. 1990 Switched Stores Yes	No	Not Sure
Total	%	29	**27**	72	1
Sex					
Men	%	30	**29**	71	*
Women	%	29	**27**	72	1
Working	%	30	**30**	70	*
Nonworking	%	28	**24**	75	1
Age					
18-24	%	34	**33**	67	0
25-39	%	35	**31**	68	*
40-49	%	28	**28**	72	1
50-64	%	24	**22**	78	1
65 or older	%	21	**23**	77	1
Income					
$15,000 or less	%	31	**30**	70	*
$15,001-$25,000	%	26	**28**	72	1
$25,001-$35,000	%	39	**27**	72	1
$35,001-$50,000	%	32	**28**	72	0
$50,001 or more	%	27	**26**	72	2
Region					
East	%	31	24	76	0
Midwest	%	26	**26**	73	1
South	%	33	**30**	69	*
West	%	25	**30**	69	1

*Less than 0.5 percent.

Table 13 Reasons for Store Switching

Q.: For what reasons did you switch?

Base: Those who switched grocery stores

		Jan. 1989 Total	**Jan. 1990 Total**
		302	**278**
New store is closer/conveniently located	%	41	**50**
Better/lower prices	%	37	**40**
More variety/selection	%	23	**28**
Better meats	%	10	**11**
Better produce	%	9	**9**
Other	%	26	**16**
Not sure	%	1	**1**

Multiple responses accepted.

Visits to Supermarkets in an Average Week

Since 1981, the frequency with which shoppers visit their supermarket in a typical week has varied between 2.0 and 2.6 trips (see Table 14). The 1990 average of 2.2 trips is consistent with the average of 2.3 trips reported in 1989.

Only household size differentiated shoppers on this measure (see Table 15). Shoppers in larger households typically make more weekly visits to their supermarket than those from smaller households (see Table 16).

Table 14 **How Often Shoppers Visit the Supermarket in an Average Week: 1981-1990**

Q.: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores.

Base: The shopping public

	Total									
	Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	**Jan. 1990**
	%	%	%	%	%	%	%	%	%	%
Number of Visits										
1	26	31	31	31	29	31	29	28	30	**31**
2	33	32	34	31	32	34	32	32	31	**32**
3	21	20	20	20	20	20	21	22	21	**21**
4	8	7	8	8	9	6	8	9	6	**7**
5	4	3	3	4	4	4	3	4	3	**3**
6 or more	6	3	3	3	4	2	4	3	5	**3**
Every 2 weeks	1	1	*	2	2	1	1	2	3	**3**
Average number of supermarket visits per week	2.6	2.3	2.3	2.3	2.3	2.0	2.4	2.3	2.3	**2.2**

*Less than 0.5 percent.

Table 15 How Often Shoppers Visit the Supermarket in an Average Week, by Sex and Age

Q.: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores.

Base: The shopping public

	Jan. 1990 Total	Men	Women			Age				
			Total	Working	Nonworking	18-24	25-39	40-49	50-64	65+
Base	**1,005**	401	604	312	291	75	383	205	181	149
	%	%	%	%	%	%	%	%	%	%
Number of Visits										
1	**31**	29	32	30	33	21	31	28	30	40
2	**32**	31	33	35	30	37	35	34	27	29
3	**21**	21	21	19	22	23	22	20	21	18
4	**7**	8	7	8	6	4	6	7	14	2
5	**3**	5	3	2	4	3	2	6	2	3
6 or more	**3**	3	3	3	2	3	2	2	2	3
Every 2 weeks	**3**	3	3	4	3	8	2	3	3	5
Average number of supermarket visits per week	**2.2**	2.2	2.2	2.2	2.2	2.2	2.2	2.3	2.3	2.0

May not add to 100 percent due to rounding.

Table 16 How Often Shoppers Visit the Supermarket in an Average Week, by Size of Household

Q.: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores.

Base: The shopping public

	Jan. 1990 Total	Size of Household				
		One	Two	Three	Four	Five or More
Base	**1,005**	169	340	200	174	119
		%	%	% %	%	%
Number of Visits						
1	**31**	43	32	27	30	22
2	**32**	30	34	33	32	29
3	**21**	13	21	22	20	31
4	**7**	3	5	11	7	10
5	**3**	3	3	2	5	4
6 or more	**3**	2	2	1	5	3
Every 2 weeks	**3**	7	3	4	2	1
Average number of supermarket visits per week	**2.2**	1.8	2.1	2.2	2.4	2.5

Supermarkets and Takeout Food

For the fifth consecutive year, *Trends* asked shoppers where they usually buy food that is eaten—but not prepared—at home (see Table 17). By far the most widely used source of takeout food is a fast-food restaurant (46 percent). More than one in four buy it in a restaurant (27 percent). Supermarkets are the source of takeout food for more than one in 10 shoppers (14 percent), slightly more than in 1989.

The use of supermarkets for takeout food varies by sex, presence of children, household size, age and income: (see Table 18).

- Men and nonworking women are more likely than working women to buy takeout food in a supermarket.
- Shoppers from childless households more frequently buy takeout food from their supermarket than shoppers with children.
- Shoppers from one-person households are much more likely to carry out from a supermarket than those from larger households.
- Shoppers 65 or older are over twice as likely than younger ones to use their supermarket for carryout food.
- Shoppers in the East more frequently buy takeout food in a supermarket than shoppers in the West.

Table 17 **Source of Takeout Food: 1986-1990**

Q.: When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say *most often* from a fast-food restaurant, a restaurant, a supermarket, convenience store, or from some other place?**

Base: The shopping public

	Jan. 1986 Total	Jan. 1987 Total	Jan. 1988 Total	Jan. 1989 Total	**Jan. 1990 Total**
Base***	1,004	1,007	1,019	1,031	**514**
	%	%	%	%	**%**
Fast-food restaurant	43	44	41	41	**46**
From a restaurant***	38	33	38	33	**27**
From a supermarket***	10	9	11	12	14
From a convenience store	x	x	x	x	**2**
Some other place	2	7	3	6	**2**
It varies (Vol.)	1	1	1	3	**4**
Don't eat out	x	x	x	7	**6**
Not sure	3	3	4	1	*

x = Not asked.

*Less than 0.5 percent.

**In 1986–1989, the question wording was "Would you say *most often* from a fast-food store, a carryout section of a restaurant, a carryout section of a supermarket, or from some other place?"

***1990 split sample.

Table 18 Use of Supermarkets as Sources of Takeout Food

Q.: When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food restaurant, a restaurant, a supermarket, a convenience store, or from some other place?

Base: The shopping public

	Jan. 1990 Base	Jan. 1990 Use Supermarket for Takeout Food
Total*	514	% 14
Sex		
Men	197	% 17
Female	317	% 13
Working	152	% 9
Nonworking	165	% 16
Type of Household		
With children	217	% 9
No children	296	% 17
Size of Household		
1	93	% 23
2	160	% 14
3	106	% 11
4	92	% 11
5 or more	61	% 10
Age		
18-24	38	% 11
25-39	191	% 11
40-49	106	% 10
50-64	90	% 13
65 or older	79	% 27
Region		
East	136	% 19
Midwest	135	% 13
South	164	% 13
West	79	% 6

*1990 split sample

CHAPTER 4

Store Products and Services

Availability

As in 1989, the 1990 *Trends* asked shoppers about the availability of new products and services in their supermarket (see Table 19). Of the 16 items about which shoppers were questioned, a significant change was noted with respect to only one: the availability of gourmet or specialty foods declined from 66 percent in 1989 to 56 percent in 1990—continuing the downward trend first noted in 1989.

Photo finishing is the only other service whose availability decreased at least five percentage points.

At least eight in 10 shoppers report that four products and services are readily available:

- Food products designed especially for microwave cooking (93 percent).
- Private label or store brands (93 percent).
- Partially prepared foods that require less time to prepare at home (83 percent).
- Delicatessen or other carryout food items (80 percent).

The availability of postage stamps, automatic teller machines, partially prepared foods, fresh pizza and video rentals has leveled off after significant increases from 1988 to 1989.

Using Store Products and Services

Shoppers whose supermarket provides a specific product or service were asked how often they used it (see Table 20). The largest proportion of shoppers used the following:

- Private label or store brands (37 percent).
- Delicatessen and other carryout food items (29 percent).
- Food products designed especially for microwave cooking (26 percent).
- Unpackaged or bulk food (24 percent).
- Postage stamps (22 percent).

Despite their availability, more than half of all shoppers say they never use four services:

- Food catering (61 percent).
- Video rentals (60 percent).
- A full-service, in-store bank (52 percent).
- Automatic teller machines (54 percent).

Over the past year few changes occurred in the proportions of shoppers who frequently use specific items. The proportions who frequently use unpackaged or bulk food increased to 24 percent, from 17 percent in 1989. More notably, the percentage who reported using service ice cream dropped by 16 points. Frequent use of video rentals declined modestly (from 17 percent in 1989 to 11 percent in 1990).

While these proportions may indicate actual changes in shopper behavior, caution is necessary when interpreting these numbers due to the relatively small numbers of shoppers answering each question. For example, in the case of ice cream shop ice cream, only 11 percent of the total were eligible to be asked about their use of this item. Their responses, while accurate, are necessarily associated with a higher statistical error due to the small number of people responding.

Table 19 **Availability of New Products and Services**

Q.: Thinking about the supermarket where you do most of your shopping, does it carry or have (READ EACH ITEM)?

Base: The shopping public

		Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990*		
		Yes	Yes	Yes	Yes	**Yes**	No	Not Sure
Food products designed especially for microwave cooking	%	86	89	93	94	**93**	4	2
Private label or store brands	%	x	x	x	x	**93**	4	3
Partially prepared foods that require less time to prepare at home	%	63	78	77	83	**83**	13	4
Delicatessen or other carryout food items	%	74	78	80	82	**80**	18	2
Unpackaged or bulk food	%	54	61	56	55	**58**	39	3
Gourmet or specialty foods	%	70	72	74	66	**56**	39	5
Fresh (not frozen) pizza	%	47	52	47	53	**51**	42	7
Photo finishing	%	x	x	50	54	**49**	42	9
Food catering	%	38	41	45	47	**49**	42	9
Video rentals	%	x	38	44	50	**47**	49	5
Postage stamps	%	x	29	34	46	**46**	41	14
Automatic teller machines	%	33	32	35	42	**42**	54	4
A salad bar**	%	51	37	40	42	**38**	60	2
Prescription drug counter	%	x	x	27	31	**30**	68	2
A full-service, in-store bank	%	x	x	x	17	**15**	82	3
Ice cream shop (not packaged) ice cream	%	x	x	6	9	**11**	88	1

x = Not asked.

*Split sample; bases = 491 and 514.

**In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."

May not add up to 100 percent due to rounding.

Table 20 Shoppers' Use of New Products and Services

Q.: How often do you use or purchase (READ EACH ITEM)? Would you say frequently, occasionally, rarely, or never?

Base: The shopping public who say their supermarkets have the product or service

		Frequently				Jan. 1990**				
		Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Frequently	Occasionally	Rarely	Never	Not Sure
Private label or store brands	%	x	x	x	x	**37**	40	15	8	*
Delicatessen or other carryout food items	%	25	28	27	27	**29**	40	19	11	0
Food products designed especially for microwave cooking	%	18	22	25	29	**26**	35	19	21	0
Unpackaged or bulk food	%	22	20	15	17	**24**	39	21	15	1
Postage stamps	%	x	30	23	20	**22**	23	17	38	0
Prescription drug counter	%	x	x	26	17	**19**	23	13	45	0
Automatic teller machines	%	33	24	23	16	**18**	14	13	54	*
A full-service, in-store bank	%	x	x	x	18	**17**	19	10	52	1
Partially prepared foods that require less time to prepare at home	%	14	16	16	18	**16**	42	28	14	0
Gourmet or specialty foods	%	8	13	8	14	**12**	38	33	16	*
Ice cream shop (not packaged) ice cream	%	x	x	13	27	**11**	39	17	33	0
Video rentals	%	x	11	14	17	**11**	16	13	60	*
A salad bar***	%	20	13	12	14	**11**	19	24	47	0
Photo finishing	%	x	x	15	12	**11**	24	16	49	0
Fresh (not frozen) pizza	%	6	11	10	10	**6**	26	29	38	0
Food catering	%	3	2	2	2	**2**	17	19	61	0

x = Not asked.

*Less than 0.5 percent.

**Split sample; bases = 491 and 514.
May not add to 100 percent due to rounding.

***In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."

Potential Use of Store Products and Services

Once again in 1990, shoppers whose supermarkets do not carry a particular item were asked how frequently they would use the item if it were available (see Table 21). The item most in demand is private label or store brands (30 percent). Also mentioned were stamps (26 percent) and products designed for microwave cooking (19 percent). The most often-cited product that shoppers would purchase at least occasionally was delicatessen or carryout food items (45 percent).

Although private label and store brands, postage stamps and microwave food products were cited most often by shoppers as products they would frequently purchase, there were equal or larger percentages of shoppers who said they would never purchase these same products. Other products that at least half would never use are food catering (61 percent) and a full-service, in-store bank (52 percent). The latter two items are "never" used by at least half of those shoppers whose supermarkets currently provide them.

Table 21 **Potential Use of New Products and Services**

Q.: If your supermarket carried or had (READ EACH ITEM), how often do you think you would use or purchase it? Would you say frequently, occasionally, rarely, or never?

Base: The shopping public who say their supermarkets do not have the product or service

		Frequently				Jan. 1990**				
		Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Frequently	Occasionally	Rarely	Never	Not Sure
Private label or store brands	%	x	x	x	x	**30**	15	10	30	10
Postage stamps	%	x	27	22	27	**26**	24	17	33	1
Food products designed especially for microwave cooking	%	7	16	7	19	**19**	14	14	48	0
Prescription drug counter	%	x	x	14	17	**16**	20	19	45	*
Automatic teller machines	%	15	14	15	19	**15**	23	21	39	1
Delicatessen or other carryout food items	%	13	18	22	13	**16**	45	21	17	0
A full-service in-store bank	%	x	x	x	16	**15**	19	13	52	2
Ice cream shop (not packaged) ice cream	%	x	x	16	11	**13**	30	26	31	*
A salad bar***	%	8	11	12	15	**11**	33	21	34	1
Partially prepared foods that require less time to prepare at home	%	8	13	13	14	**10**	24	29	34	2
Photo finishing	%	x	x	9	10	**10**	27	18	44	2
Unpackaged or bulk food	%	9	11	10	8	**8**	26	25	38	2
Fresh (not frozen) pizza	%	7	10	12	12	**8**	26	31	34	1
Video rentals	%	x	9	12	9	**8**	24	17	50	1
Gourmet or specialty foods	%	4	8	8	13	**7**	39	28	25	1
Food catering	%	3	4	2	3	**3**	14	21	61	1

x = Not asked.

*Less than 0.5 percent.

**Split sample; bases = 491 and 514.

***In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."
May not add to 100 percent due to rounding.

CHAPTER 5

Nutrition

Evaluation of Diet

For the second year, *Trends* asked shoppers to evaluate the healthfulness of their diet. Nearly two-thirds (65 percent) continue to believe that their diet could be at least somewhat healthier (see Table 22). Just about one shopper in eight (12 percent) are satisfied that their diets are as healthy as they possibly could be, and the rest think that their diets are healthy enough (24 percent).

Certain groups of shoppers are more likely to believe their diets could stand some improvement:

- More working women than men or nonworking women. Conversely, a smaller proportion feel that their diets are as healthy as they could possibly be.
- Shoppers with children are more likely than those without.
- The proportions decline with age. Fewer than half of shoppers aged 65 or older think there is some room for improvement in their diets. Shoppers aged 18 to 24 are least likely to be satisfied, followed by those aged 25 to 49.

These findings are consistent with those reported in 1989 with one exception: the percentage of shoppers aged 40 to 49 who see some room for dietary improvement has declined six points.

To ensure a healthy diet, nearly three out of five shoppers report eating more fruits and vegetables (57 percent). Signficent proportioins have reduced their meat and red meat intake (34 percent) and are using less fats and oils (27 percent). The proportion who are limiting use of fats and oils has increased significantly over the past year (from 22 percent to 27 percent). Other eating behaviors named by about one shopper in five are "less sugar" (19 percent), "more chicken" (19 percent), "more fish" (18 percent) and "more fiber" (16 percent; see Table 23).

Table 22 **Evaluation of Diet**

Q.: Thinking of all the foods you eat at home and away from home, how would you describe your diet? Would you say that it could be a lot healthier, could be somewhat healthier, is healthy enough, or is as healthy as it could possibly be?

Base: The shopping public

		Jan. 1989	**Jan. 1990**	**Jan. 1990**				
		Could Be At Least Somewhat Healthier**	**Could Be At Least Somewhat Healthier****	Could Be A Lot Healthier	Could Be Somewhat Healthier	Is Healthy Enough	Is as Healthy As It Could Possibly Be	Not Sure
Total	%	67	**65**	14	51	24	12	*
Sex								
Men	%	63	**63**	11	52	27	9	1
Women	%	68	**65**	14	51	23	13	0
Working	%	73	**72**	17	55	21	8	0
Nonworking	%	63	**57**	11	46	25	17	0
Type of Household								
With children	%	74	**70**	15	55	21	8	*
No children	%	61	**59**	12	47	25	15	*
Age								
18-24	%	75	**77**	18	59	15	6	1
25-39	%	73	**70**	14	56	23	7	0
40-49	%	77	**71**	12	59	19	10	*
50-64	%	59	**58**	17	41	25	18	0
65 or older	%	49	**45**	9	36	32	22	*

*Less than 0.5 percent.

**Combines those who believe their diet could be "a lot healthier" and "somewhat healthier."

Table 23 **Diet Behavior**

Q.: What, if anything, are you eating more or less of to ensure that your diet is healthy?

Base: The shopping public

		Jan. 1989 Total	Jan. 1990 Total
Base		1,031	**1,005**
More fruits/vegetables	%	59	**57**
Less meat/red meat	%	33	**34**
Less fats/oils	%	22	**27**
Less sugar	%	20	**19**
More chicken	%	16	**19**
More fish	%	18	**18**
More fiber	%	13	**16**
Less salt	%	13	**15**
Less cholesterol	%	12	**15**
Less fried foods	%	10	**14**
More fresh foods	%	8	**6**
Fewer calories	%	5	**5**
More protein	%	5	**4**
More balanced diet/wider variety	%	3	**5**
More organically grown/natural foods	%	2	**2**
More vitamin/mineral supplements	%	2	**1**
More foods high in vitamins/minerals	%	2	**1**
Other	%	20	**11**
Nothing	%	5	**7**
Not sure	%	3	**3**

Factors for Food Selection

The vast majority of shoppers identified taste, nutrition and product safety as very important factors when they purchase food. Price was also deemed very important by two out of three shoppers (66 percent). Less than half cited storability, food preparation time, and ease of preparation as very important (see Table 24).

Although product safety remains a highly rated factor in food selection (71 percent), the proportion of shoppers who rate it as very important continues to decline. It has dropped 12 percentage points since 1988. The proportion who feel that ease of preparation is very important also continues to decline.

Concern for nutrition continues to be not only an important factor in food selection but in the selection of a supermarket as well. Several 1990 findings support this trend. As discussed in Chapter 1, "quality fruits and vegetables" is the most-often named factor in selecting a supermarket (see Table 1). Consumers turn to produce most often to ensure a nutritional diet (see Table 23). Finally, most consumers consider in-store, nutritional information to be an important factor in selecting a supermarket (see Table 1).

The role of nutrition in food selection varies among shopper subgroups (see Table 25). The most important differences:

- More women than men view nutrition as very important.
- Older shoppers are more likely to consider nutrition very important than younger shoppers. Specifically, larger proportions of those aged 50 to 64 view nutrition as very important than those aged 18 to 49.
- Nearly all shoppers with a household member on a medically restricted diet view nutrition as very important, compared with fewer than three out of four in households without such restrictions.

Table 24 **Importance of Various Factors in Food Selection**

Q.: I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important.

Base: The shopping public

		Jan. 1988 Very Important	Jan. 1989 Very Important	Jan. 1990 Very Important	Somewhat Important	Not Too Important	Not At All Important	Not Sure
Taste	%	88	87	**88**	9	2	*	*
Nutrition	%	72	76	**75**	21	3	*	*
Product safety	%	83	74	**71**	20	7	1	1
Price	%	65	64	**66**	28	4	1	*
Storability	%	53	40	**43**	34	18	3	1
Food preparation time	%	x	37	**36**	37	21	5	1
Ease of preparation	%	39	36	**33**	40	21	5	1

x = Not asked.

*Less than 0.5 percent.

May not add to 100 percent due to rounding.

Table 25 Importance of Nutrition in Food Selection

Q.: I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important. How important is nutrition?

Base: The shopping public

	Jan. 1990 Base		Jan. 1990 Very Important	Somewhat Important	Not Too Important	Not at All Important	Not Sure
Total	1,005	%	75	21	3	*	*
Sex							
Men	401	%	65	27	6	2	*
Women	604	%	78	19	3	*	*
Working	312	%	74	22	3	0	*
Nonworking	291	%	81	16	2	*	*
Age							
18-24	75	%	62	29	8	1	0
25-39	383	%	70	26	3	0	*
40-49	205	%	75	21	4	*	0
50-64	181	%	82	16	3	*	0
65 or older	149	%	84	11	2	2	2
Medically Restricted Diet							
Yes	198	%	86	12	1	*	1
No	806	%	72	23	4	1	*
Type of Diet							
Healthy	360	%	79	17	3	1	*
Not healthy	642	%	73	23	4	*	*

*Less than 0.5 percent.

Nutritional Content of Diet

For the first time, *Trends* asked shoppers how much they pay attention to the nutritional content of the family diet—specifically, if they pay a great deal, some, not too much, or no attention (see Table 26). Nine out of 10 shoppers pay at least some attention to nutritional content, and about one-half pay a great deal of attention (52 percent).

Different subgroups of shoppers vary in the attention they pay to nutritional content. Differences are present by sex, presence of children, age, income, region, dietary restrictions, and overall healthfulness of diet (see Table 26). Significant findings are described below:

- Women are more likely than men to pay a great deal of attention to the nutritional content of the foods they eat.
- Shoppers from households without children are more likely than those from households with children to attend to nutritional information.
- Shoppers over 50 are more likely than shoppers under 40.
- Attention to nutrition increases as household income increases. Shoppers from households with incomes over $35,000 are more likely than those with incomes of $15,000 or less.

When asked which nutritional features they care most about, four in 10 shoppers mention fat content or cholesterol levels. At least one in five attend first to salt content (see Table 27).

Consistent with the finding that nine in 10 shoppers pay attention to the nutritional content, 95 percent say they are somewhat or very concerned about the nutritional content (see Table 28). The proportion of shoppers who are very concerned has held steady since 1987 and remains on a par with the 55 percent reported in 1989.

Differences in the extent of nutritional concern by shopper subgroups parallel those for attention to nutritional content. Several differences are noteworthy (see Tables 28, 29):

- Men and working women are significantly less likely than nonworking women to be very concerned about the nutritional content of the food they eat.
- Nutritional concern increases with age. Shoppers age 50 or older are more concerned than are those 18 to 49. The percentage of shoppers 65 or older who are very concerned about nutrition increased by 11 points over the past year, while the percentage of very concerned 40- to 49-year-olds declined by five points.
- Shoppers with a household member on a medically restricted diet are more likely than others to be very concerned.
- Shoppers who believe their diets are healthy enough are more likely to be concerned.

Shoppers with any concern about nutrition focus most on the fat content of food. This represents a change since last year, when cholesterol was ranked first. The percentage of shoppers concerned about fat increased significantly since 1989, by 17 points, and is now just ahead of cholesterol as the primary nutritional concern (see Table 30). The concern about fat is consistent with the finding that many shoppers are paying attention to fat content (see Table 27) and that many are lowering fat intake to ensure a healthier diet (see Table 23).

Cholesterol remains the second-ranked nutritional concern and is perceived as such by significantly more shoppers in 1990 than in 1989. Salt content remains in the third position, while calories displace vitamin and mineral content for the fourth-ranked spot. Significantly more 1990 than 1989 shoppers are concerned about these latter two items. The concern that shoppers place on vitamin and mineral content and on eating a balanced diet dropped significantly over the past year.

In 1990, *Trends* continued to examine attitudes toward specific nutrition-related items that may be perceived as health hazards (see Table 31). The percentage who consider cholesterol a serious hazard declined by 14 points in the past year to 47 percent; fats by four points; and salt by 10 points. Notably, fats have surpassed cholesterol as the most serious perceived hazard.

Table 26 **Extent to Which Shoppers Pay Attention to Nutritional Content of Food**

Q.: Thinking now of nutrition, to what extent, if any, do you and your family pay attention to the nutritional content of what you eat? Would you say a great deal, somewhat, not too much, or not at all?

Base: The shopping public

		1990**				
		A Great Deal	Not Somewhat	Not Too Much	Not At All	Sure
Total	%	52	38	8	2	*
Sex						
Men	%	45	37	13	5	1
Women	%	53	38	7	2	*
Working	%	53	40	6	1	0
Nonworking	%	54	36	7	2	1
Type of Household						
With Children	%	44	47	7	2	*
No Children	%	58	31	8	2	1
Age						
18-24	%	42	43	4	9	3
25-39	%	44	44	9	3	0
40-49	%	53	43	4	0	0
50-64	%	62	29	8	2	0
65 and older	%	57	28	12	2	2
Income						
$15,000 or less	%	44	34	16	4	1
$15,001-$25,000	%	50	39	7	3	0
$25,001-$35,000	%	49	45	3	3	1
$35,001-$50,000	%	56	36	8	1	0
$50,001 or over	%	64	32	3	0	1
Region						
East	%	50	36	8	5	1
Midwest	%	46	47	7	0	*
South	%	58	32	9	2	0
West	%	52	41	7	1	1
Medically Restricted Diet						
Yes	%	59	32	7	2	0
No	%	50	40	8	2	1
Description of Diet						
Healthy enough	%	62	23	10	4	*
Could be healthier	%	46	46	6	1	1

*Less than 0.5 percent.

**Split sample.

Table 27 Nature of Shoppers' Attention to Nutritional Content of Food

Q.: What is it about the nutritional content of what you eat that you and your family pay most attention to?

Base: The shopping public

	1990 Total
Base**	514
	%
Fat content, low fat	40
Cholesterol levels	39
Salt content, less salt	28
Calories, low calories	21
Sugar content, less sugar	18
Vitamin/Mineral content	13
Preservatives	6
Fiber content	6
Food/nutritional value	5
Protein value	5
Making sure we get a balanced diet	4
Chemical additives	4
Freshness, purity, no spoilage	4
Ingredients/contents	4
Less red meat	4
Carbohydrate content	4
Desire to be healthy/eat what's good for us	3
As natural as possible, not overly processed	2
Quality of food	2
Empty calories, junk food	2
Chemicals	1
No harmful ingredients, nothing that causes illness/cancer	1
Excess food coloring, dyes	1
Less frying/more broiling	1
Starch content	1
Artificial sweetener	*
Processed foods	*
Not sure/refused	4

*Less than 0.5 percent.

**Split sample.

Table 28 **Level of Shoppers' Concern About the Nutritional Content of Food: 1984-1990**

Q.: Would you say you and your family are very concerned, somewhat concerned, not very concerned, or not at all concerned about the nutritional content of the food you eat?

Base: The shopping public

		Very Concerned						1990**			
		1984	1985	1986	1987	1988	1989	**Very Concerned**	Somewhat Concerned	Not Very/ Not At All Concerned	Not Sure
Total	%	63	59	58	54	56	55	**55**	40	5	*
Sex											
Men	%	62	51	55	48	48	51	**50**	41	8	1
Women	%	64	60	58	55	58	57	**56**	39	4	0
Working	%	64	60	54	49	53	51	**51**	46	3	0
Nonworking	%	63	62	62	62	64	63	**64**	31	6	0
Type of Household											
With Children	%	62	62	57	52	52	53	**52**	44	4	0
No Children	%	64	56	58	55	59	57	**58**	36	6	*
Age											
18-24	%	51	52	55	41	33	41	**41**	57	3	0
25-39	%	58	56	54	47	51	51	**48**	47	5	0
40-49	%	67	63	49	54	52	57	**52**	43	5	0
50-64	%	71	62	68	60	66	65	**62**	31	7	0
65 and older	%	67	58	65	69	72	63	**74**	21	5	1
Region											
East	%	66	65	58	58	54	53	**56**	38	6	0
Midwest	%	63	53	53	49	52	53	**47**	48	5	0
South	%	62	59	59	56	60	56	**61**	34	5	0
West	%	59	57	62	53	56	61	**56**	38	5	1

*Less than 0.5 percent.

**Split sample, n = 491.

Table 29 **Level of Shoppers' Concern About the Nutritional Content of Food**

Q.: Would you say you and your family are very concerned, somewhat concerned, not very concerned, or not at all concerned, about the nutritional content of the food you eat?

Base: Split sample of the shopping public

		Very Concerned	Somewhat Concerned	Not Very/ Not At All Concerned	Not Sure
Total	%	55	40	5	*
Medically Restricted Diet					
Yes	%	70	25	4	1
No	%	51	44	5	0
Description of Diet					
Healthy enough	%	66	28	6	*
Could be healthier	%	49	47	5	0

*Less than 0.5 percent.

May not add up to 100 percent due to rounding.

Table 30 **Nature of Shoppers' Concern About the Nutritional Content of Food: 1983-1990**

Q.: What is it about the nutritional content of what you eat that concerns you and your family most?

Base: The shopping public

	1983 Total	1984 Total	1985 Total	1986 Total	1987 Total	1988 Total	1989 Total	**1990** Total**	1989-1990 Percentage Point Change
	%	%	%	%	%	%	%	**%**	%
Fat content, low fat	9	8	13	17	16	27	29	**46**	+17
Cholesterol levels	5	8	10	13	14	22	38	**44**	+ 6
Salt content, less salt	18	17	19	20	22	26	25	**30**	+ 5
Calories, low calories	6	9	9	11	14	14	15	**19**	+ 4
Sugar content, less sugar	21	22	20	18	16	20	15	**16**	+ 1
Vitamin/Mineral content	24	19	17	22	21	21	21	**14**	- 7
Preservatives	22	17	13	15	14	16	9	**7**	- 2
Food/nutritional value	10	19	14	11	13	14	8	**6**	- 2
Fiber content	2	1	2	3	4	5	5	**5**	0
Making sure we get a balanced diet	10	9	11	14	14	11	10	**4**	- 6
Chemical additives	27	25	18	16	10	12	7	**4**	- 3
Freshness, purity, no spoilage	14	12	8	8	8	15	6	**4**	- 2
Ingredients/content	0	0	0	0	0	8	4	**4**	0
Desire to be healthy/eat what's good for us	0	0	3	6	7	7	6	**3**	- 3
Chemicals	0	0	0	0	0	4	3	**3**	0
Protein value	5	6	4	5	4	6	4	**2**	- 2
As natural as possible, not overly processed	12	6	5	3	0	4	3	**2**	- 1
Less red meat	0	0	2	2	0	0	3	**2**	- 1
Quality of food	3	5	1	1	0	0	3	**2**	- 1
No harmful ingredients, nothing that causes illness/cancer	10	6	5	5	0	0	2	**2**	+ 2
Carbohydrate content	1	2	2	2	2	3	2	**1**	- 1
Starch content	1	1	1	1	0	0	1	**2**	+ 1
Artificial sweetener	0	0	2	1	*	0	1	**1**	0
Processed foods	0	0	0	0	0	3	1	**1**	0
Less frying/more broiling	0	0	0	0	0	2	1	**1**	- 1
Excess food coloring, dyes	6	4	3	2	3	0	1	*	- 1
Empty calories, junk food	4	4	5	2	7	6	2	*	- 2
Not sure/refused	5	5	6	5	7	2	7	**6**	- 1

*Less than 0.5 percent.

**Split sample, base = 491.

Table 31 Consumer Concern About Selected Nutritional Attributes: 1984-1990

Q.: I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all?

Base: The shopping public

		Serious Hazard						1990			
		1984	1985	1986	1987*	1988**	1989	**Serious Hazard**	Some-thing Of a Hazard	Not a Hazard At All	Not Sure
Fats	%	x	42	44	55	61	58	**54**	41	5	1
Cholesterol	%	45	44	48	51	59	61	**47**	46	5	2
Salt in food	%	37	39	40	43	42	44	**34**	57	9	1
Sugar in food	%	31	29	29	28	28	23	**17**	58	24	1

x = Not asked.

*Split sample; bases = 498 and 509.

**Split sample; bases = 508 and 511.

May not add up to 100 percent due to rounding.

Food Preparation

Once again, *Trends* examined changes in food preparation. Six in 10 shoppers have changed how they cook or prepare food in the past three to five years (see Table 32). The percentage who report changes has rebounded by six points after a 12-point decrease from 1988 to 1989. The subgroups reporting the most change are women, shoppers with children, and 25- to 64-year olds.

The proportions of shoppers who prepare foods differently varies substantially by demographic characteristics (see Table 32):

- Women are more likely than men to prepare foods differently.
- Shoppers from households with children are more likely than those without.
- Shoppers aged 25 to 64 are more likely than those from other age groups.
- Shoppers from households with someone on a medically restricted diet are more likely than those whose households lack such persons.

Table 32 **Consumer Behavior Related to Food Preparation: 1987-1990**

Q.: In the past three to five years, have you been cooking or preparing foods differently than you used to?

Base: The shopping public

		Jan. 1987 Yes	Jan. 1988 Yes	Jan. 1989 Yes	Jan. 1990 Yes	Jan. 1990 No	Jan. 1990 Not Sure
Total	%	64	67	55	**61**	39	*
Sex							
Men	%	56	55	49	**52**	48	*
Women	%	66	70	56	**63**	37	*
Working	%	66	71	56	**64**	36	0
Nonworking	%	66	68	56	**62**	38	*
Type of Household							
With Children	%	63	64	54	**64**	36	*
No Children	%	65	69	55	**58**	42	*
Age							
18-24	%	56	60	39	**49**	51	0
25-39	%	59	65	56	**62**	37	*
40-49	%	71	71	57	**63**	38	0
50-64	%	64	73	60	**68**	33	0
65 or older	%	70	65	56	**51**	49	*
Region							
East	%	68	67	52	**54**	47	0
Midwest	%	65	69	57	**63**	37	1
South	%	64	64	55	**64**	36	0
West	%	58	69	55	**62**	38	0
Medically Restricted Diet							
Yes	%	x	x	68	**70**	30	0
No	%	x	x	51	**58**	42	*

x = Not asked.

*Less than 0.5 percent.

Responsibility for Food Nutrition

For the second year, *Trends* asked shoppers on whom they rely to ensure that the products they buy are nutritious (see Table 33). More than one in three rely on themselves (36 percent), while about one in five rely on government (23 percent) or manufacturers (21 percent). Self-reliance gained seven percentage points, breaking a tie with manufacturers to occupy the top spot alone.

Table 33 **Those on Whom Shoppers Rely to Ensure That the Products They Buy Are Nutritious**

Q.: Who do you feel should be *primarily* responsible for ensuring that the food you buy from the supermarket is nutritious: the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?

Base: The shopping public

		Jan. 1989 Total	**Jan. 1990 Total**
Base		1,031	**1,005**
Yourself as an individual	%	29	**36**
Manufacturers	%	29	**21**
Government	%	28	**23**
Federal	%	22	**17**
State	%	6	**5**
Consumer organizations	%	6	**7**
Retailers	%	4	**6**
Other (Vol.)	%	1	**4**
None (Vol.)	%	*	**1**
Not sure	%	4	**3**

*Less than 0.5 percent.

Food Labeling

In 1990, *Trends* first compared how shoppers read food labels for first-time versus all-product purchases. For each situation, shoppers were asked how often they read labels for information on ingredients and nutrition. All shoppers were asked how often they check labels for expiration dates. They were then asked how adequately current food label information aids meal planning and addresses dietary and health concerns.

Almost three in four shoppers always read food labels for the expiration date (see Table 34). About half as many read labels for either the ingredients or nutritional information. Nearly half read information on ingredients (48 percent) and nutrition (45 percent) at least some of the time. Fewer than one out of five shoppers rarely or never check food labels for ingredient or nutritional information.

The reading of labels for ingredient and nutritional information is more prevalent for first-time purchases than for product purchases in general. When making first-time purchases, about half of all shoppers read the label for either ingredient (53 percent) or nutritional (49 percent) information. Nearly four in 10 sometimes read ingredient (35 percent) or nutritional (38 percent) information. Less than 15 percent rarely or never read this information.

Differences exist among the proportions of shoppers who always read food labels for expiration dates, ingredient and nutritional information. The proportions of shoppers who are most likely to read these types of information (see Table 35):

- Women are more likely than men to read food labels for ingredient or nutritional information. Nonworking women are more likely than either working women or men to say they always read the list of ingredients.
- Shoppers who are 50 or older are more likely than those 18 to 49 to read labels for the list of ingredients.
- Nutritional information is of more interest to shoppers older than 50 and those 25 to 39, and of less interest to shoppers 18 to 24 or 40 to 49.
- Shoppers who are at least 65 years of age are less likely to read labels for expiration dates than shoppers of other ages.
- Shoppers from the Midwest are less likely than others to read labels for either ingredient or nutritional information. Shoppers from the South are most likely to check expiration dates.
- Shoppers on medically restricted diets are far more likely than others to read food labels for ingredient and nutritional information.
- Shoppers who consider their diets healthy enough are far more likely than others to read food labels for both ingredient and nutritional information, and somewhat more likely to read labels for expiration dates.

There also are demographic differences among shoppers who always read ingredient and nutritional information when purchasing a product for the first time (see Table 36).

- Nonworking women are more likely than men to read food labels for ingredient information.
- Shoppers from households without children are more likely than others to check both types of information.
- Older shoppers are more likely to read labels for both ingredient and nutritional information. Shoppers 40 or older are more likely than those 18 to 39 to read the list of ingredients and nutritional information.
- Shoppers with a household member on a medically restricted diet are more likely than others to read both types of information the first time they purchase a product.
- Shoppers who consider their diets healthy enough are more likely to read a food label for ingredient and nutritional information than those with a lower regard for their diets.

Half of all shoppers stated that the current food label provides them with all or most of the information they need for meal planning and dietary and health concerns (see Table 37). About half (48 percent) find that the current food labels provide them with some or none of the needed information. Subgroup differences are limited to size of household: the extent to which shoppers find label information adequate declines as the household size increases.

Table 34 Frequency of Reading Food Labels

Q.: When you buy packaged foods, how often do you read the label for information on ingredients, nutrition, and the expiration date? Would you say always, sometimes, rarely, or never?

Base: The shopping public

	Jan. 1990 Base		All Packaged Food Purchases				
			Always	Sometimes	Rarely	Never	Not Sure
Expiration Date**	1,005	%	72	20	1	*	*
Ingredients***	491	%	36	48	12	4	*
Nutrition***	491	%	36	45	14	5	*

Q.: When you buy a packaged food product for the *first time*, how often do you read the label for information on ingredients and nutrition? Would you say always, sometimes, rarely, or never?

	Jan. 1990 Base		First-Time Purchases Only				
			Always	Sometimes	Rarely	Never	Not Sure
Ingredients***	514	%	53	35	8	5	*
Nutrition***	514	%	49	38	7	5	1

*Less than 0.5 percent.

**Asked of all respondents.

***Split sample.

Table 35 **Frequency of Reading Food Labels, by Shopper Characteristics**

Q.: When you buy packaged foods, how often do you read the label for information on ingredients, nutrition, and the expiration date? Would you say always, sometimes, rarely, or never?

Base: The shopping public

	Jan. 1990 Base**		Ingredients	Nutrition	Expiration Dates*
Always					
Total	491	%	36	36	72
Sex					
Men	204	%	29	29	67
Women	287	%	38	38	73
Working	160	%	30	35	74
Nonworking	126	%	48	41	73
Age					
18-24	37	%	31	29	72
25-39	192	%	31	38	75
40-49	99	%	30	28	70
50-64	91	%	41	39	74
65 or older	70	%	56	40	65
Region					
East	119	%	44	45	71
Midwest	148	%	28	30	69
South	151	%	37	35	77
West	73	%	42	37	67
Medically Restricted Diet					
Yes	94	%	62	58	77
No	397	%	30	30	71
Description of Diet					
Healthy enough	174	%	50	47	75
Could be healthier	316	%	29	30	70

*Base = 1,005.

**Split sample.

Table 36

Frequency of Reading Food Labels for First-Time Purchases, by Shopper Characteristics

Q.: When you buy a packaged food product for the *first* time, how often do you read the label for information on ingredients and nutrition? Would you say always, sometimes, rarely, or never?

Base: The shopping public

	Jan. 1990 Base		Ingredients	Nutrition
Always				
Total	514	%	53	49
Sex				
Men	197	%	48	45
Women	317	%	54	50
Working	152	%	49	47
Nonworking	165	%	59	53
Type of Household				
With children	217	%	46	43
No children	296	%	59	54
Age				
18-24	38	%	29	23
25-39	191	%	45	40
40-49	106	%	55	56
50-64	90	%	66	58
65 or older	79	%	59	58
Region				
East	136	%	53	50
Midwest	135	%	48	44
South	164	%	56	52
West	79	%	57	49
Medically Restricted Diet				
Yes	104	%	64	57
No	409	%	50	47
Description of Diet				
Healthy enough	186	%	60	57
Could be healthier	326	%	49	45

Table 37 Adequacy of Information on Current Food Labels

Q.: To what extent do you find that current food labels provide you with all the information you need for purposes of meal planning and dietary and health concerns when deciding whether to purchase a product?

Base: The shopping public

	Jan. 1990 Base		Adequacy of Information					
			All/Most	All	Most	Some	Not Much/ None	Not Sure
Total	1,005	%	50	7	43	41	7	2
Sex								
Men	401	%	51	10	41	37	9	3
Women	604	%	50	6	44	42	7	2
Working	312	%	50	4	45	43	6	1
Nonworking	291	%	51	9	42	41	7	2
Age								
18–24	75	%	59	13	46	35	3	3
25–39	383	%	48	7	41	43	6	2
40–49	205	%	52	6	46	41	7	1
50–64	181	%	52	7	45	38	9	1
65 or over	149	%	48	6	42	40	9	4
Education								
High school or less	516	%	48	7	41	43	7	2
Some college/college graduate	484	%	52	7	45	38	7	2
Size of Household								
1	169	%	55	11	44	37	6	2
2	340	%	52	5	47	38	7	3
3	200	%	49	8	41	42	8	1
4	174	%	46	7	39	47	6	2
5 or more	119	%	46	7	39	43	10	1
Restricted Diet								
Yes	198	%	54	9	40	43	7	1
No	806	%	49	6	44	40	7	2

Manufacturers' Health-Related Statements

For the first time, *Trends* asked shoppers about statements manufacturers make about the health benefits and risks associated with food products. Shoppers were first asked if they found these statements very, somewhat, not very, or not at all believable. Shoppers who found statements less than fully believable were asked to state their reasons. All shoppers were next asked the extent to which manufacturers' statements influence their decision to purchase a food product.

Shoppers find manufacturers' statements, at best, somewhat believable (Table 38). Several subgroup differences were evident:

- More nonworking women than men find these statements very believable or at least somewhat believable.
- The proportion who find statements very believable or at least somewhat believable generally declines with age. Shoppers 18 to 24 are most likely to believe such statements, followed by those aged 25 to 29, 65 and over, and those 50 to 64.
- Shoppers from households with an income of more than $50,000 are less likely than other shoppers to find these statements believable.
- Shoppers who visit their supermarket infrequently place more credence on these statements than shoppers who visit supermarkets frequently.

Shoppers who find health claims by manufacturers less than fully believable feel the statements don't tell the whole story (61 percent; see Table 39). Almost half of the shoppers think the statements are not honest or truthful. Approximately one out of four shoppers believe that statements are advertising gimmicks, the claims contradict their own knowledge or are otherwise inconsistent.

One out of four shoppers say that health-related statements have a great deal of influence on their decision to purchase a food product (see Table 40). Almost half (48 percent) find them somewhat influential, and the remaining quarter report that health claims influence their purchase decision not very much or not at all (27 percent).

The influence of health messages on a product purchase decisions varies by shopper category. Among shoppers who find these statements very influential, the most important differences are (see Table 40):

- Men are less likely than nonworking women to be influenced by these statements.
- Shoppers from households earning more than $35,000 are less likely to be influenced than those from any other income category.
- Shoppers from households of five or more persons are less likely to be influenced by health claims than are those in smaller households.
- Shoppers who give their primary supermarket the highest rating are more likely than others to be influenced by manufacturers' statements.

Table 38 Believability of Health Claims Made by Food Manufacturers

Q.: Food manufacturers sometimes make statements about the health-related benefits and risks associated with their food products. For example, a manufacturer might say its product is low in cholesterol and may reduce the risk of heart attack. To what extent do you find these statements believable?

Base: The shopping public

	Jan. 1990 Base		Very/ Somewhat Believable	Very Believable	Somewhat Believable	Not Very Believable	Not At All Believable	Not Sure
Total	1,005	%	60	8	52	26	13	1
Sex								
Men	401	%	57	8	49	25	16	2
Women	604	%	61	8	53	26	12	1
Working	312	%	59	5	54	29	12	1
Nonworking	291	%	64	11	53	23	12	1
Age								
18–24	75	%	73	14	59	19	8	0
25–39	383	%	63	6	57	26	10	1
40–49	205	%	61	7	54	27	12	1
50–64	181	%	53	8	45	28	18	2
65 or over	149	%	56	11	45	29	14	2
Income								
$15,000 or less	185	%	61	13	48	24	14	1
$15,001-$25,000	206	%	61	9	52	28	9	2
$25,001-$35,000	196	%	64	6	58	27	8	1
$35,001-$50,000	190	%	60	4	56	21	19	1
$50,001 or more	151	%	54	3	51	30	15	3
Frequency of Supermarket Visits								
Frequent	344	%	53	6	47	31	15	2
Infrequent	626	%	64	8	56	23	12	1
Restricted Diet								
Yes	198	%	55	7	48	31	14	1
No	806	%	62	8	54	25	13	1

Table 39 Reasons For Doubting Health Claims Made By Food Manufacturers

Q.: Food manufacturers sometimes make statements about the health-related benefits and risks associated with their food products. To what extent do you find these statements believable? What is it about these statements that leads you to say this?

Base: Those who find statements by food manufacturers less than very believable

		Jan. 1990 Total	Somewhat Believable	Not Very/ Not At All Believable
Base		914	518	396
Don't include all the ingredients/don't tell you about harmful ingredients in products misleading	%	30	27	34
Statements are not always honest/truthful	%	24	21	28
Just an advertising gimmick/just want to sell product	%	13	11	15
My own knowledge/experience	%	10	9	11
Constant contradictions of statements	%	9	8	11
Information learned from other media	%	8	9	7
Trust the manufacturer	%	3	5	1
Don't think one product will change health	%	3	3	4
Information learned from doctors/people in health field	%	2	2	3
Other	%	12	14	9
Don't know	%	6	7	4

Table 40 Influence of Food Manufacturers' Health Claims on Food Purchases

Q.: To what extent do such statements about health-related benefits and risks influence your decision to purchase a food product? Would you say a great deal, somewhat, not very much, or not at all?

Base: The shopping public

	Jan. 1990 Base		A Great Deal	Somewhat	Not Very Much	Not At All	Not Sure
Total	1,005	%	25	48	17	10	1
Sex							
Men	401	%	23	44	20	13	1
Women	604	%	25	49	17	9	1
Working	312	%	20	50	18	12	*
Nonworking	291	%	31	47	15	6	1
Education							
High school or less	516	%	26	48	16	9	1
Some college/college graduate	484	%	23	48	18	11	1
Income							
$15,000 or less	185	%	29	40	19	11	1
$15,001-$25,000	206	%	29	49	12	10	*
$25,001-$35,000	196	%	24	49	21	6	1
$35,001-$50,000	190	%	18	52	19	10	2
$50,000 or over	151	%	19	51	19	11	0
Size of Household							
1	169	%	29	43	20	6	2
2	340	%	24	46	19	9	1
3	200	%	23	47	15	15	1
4	174	%	28	47	15	10	*
5 or more	119	%	19	62	15	5	0
Restricted Diet							
Yes	198	%	28	46	17	8	1
No	806	%	24	49	17	10	1
Supermarket Rating							
1–5	75	%	27	45	16	11	2
6–9	789	%	22	50	18	9	1
10	139	%	36	39	14	11	0

*Less than 0.5 percent.

Responsibility for Accuracy of Manufacturers' Statements

In 1990, as part of its inquiry into shoppers' impressions of manufacturers' health-related statements, *Trends* asked shoppers on whom they rely to ensure that these health messages are accurate. As shown in Table 41, shoppers place equal responsibility with the federal government and manufacturers (34 percent each). When those who rely on state or federal government are combined, the proportion is 40 percent. About one out in 10 rely on consumer organizations (11 percent).

Consistent with their reliance on government, nearly two out of three shoppers believe that these health messages for food products already require government approval (see Table 42). One out of four shoppers do not believe that the manufacturer requires government approval to make statements (25 percent) and one out of ten (11 percent) are not certain.

The proportion of consumers who believe that manufacturers' health messages already require government approval differs among various subgroups (see Table 42):

- Women are more likely than men to believe that the government must sanction manufacturers' statements.
- Shoppers aged 25 to 49 are less likely than those of other ages to believe that health messages require government approval.
- Shoppers with less than a college education are more likely than those with at least some college education to believe manufacturers must have government approval for health messages on food products.
- The proportion who believe in government approval declines as income increases. Specifically, shoppers from households with an income of $15,000 or less are more likely to believe in government approval, followed by those earning $15,001 to $35,000, then those earning more.
- Shoppers from the East and South are more likely than those from the Midwest and West to believe health statements require government approval.

Table 41 **Primary Responsibility for Ensuring That Health Messages Are Accurate**

Q.: Who do you feel should be *primarily* responsible for ensuring that these health messages are accurate?

Base: The shopping public

	Jan. 1990 Total
Base	1,005
Government	40%
Federal	34%
State	6%
Manufacturers	34%
Consumer organizations	11%
Yourself as an individual	6%
Retailers	4%
Other	3%
None	*
Not sure	2%

*Less than 0.5 percent.

Table 42 Government Approval of Health Messages for Food Products

Q.: To the best of your knowledge, do health messages for food products require government approval?

Base: The shopping public

	Jan. 1990 Base		Health Messages Require Government Approval		
			Yes	No	Don't Know
Total	1,005	%	64	25	11
Sex					
Men	401	%	57	33	10
Women	604	%	66	23	11
Working	312	%	63	25	12
Nonworking	291	%	69	22	10
Age					
18–24	75	%	77	16	7
25–39	383	%	61	28	11
40–49	205	%	57	31	13
50–64	181	%	67	19	14
65 or over	149	%	72	22	6
Education					
High school or less	516	%	71	18	12
Some college/college graduate	484	%	57	34	10
Income					
$15,000 or less	185	%	76	13	11
$15,001-$25,000	206	%	69	22	10
$25,001-$35,000	196	%	64	27	9
$35,001-$50,000	190	%	50	37	14
$50,000 or over	151	%	54	36	10
Region					
East	255	%	68	22	10
Midwest	283	%	60	29	11
South	315	%	67	22	11
West	152	%	60	29	11

CHAPTER 6

Food Safety

Confidence in the Food Supply

After the 1989 *Trends* survey in January, considerable publicity was given to the use of the chemical Alar on apples and the tampering incident involving Chilean grapes. To gauge the impact of those events, FMI tracked consumer confidence in the food supply throughout the spring and summer of 1989 and once again in the 1990 *Trends*. Following the Alar and grape publicity, consumer confidence dropped to as low as 65 percent, then it rebounded to 79 percent—only two points lower than the January 1989 level. In the 1990 survey, more than three out of five shoppers (64 percent) are mostly confident that the food is safe, while one in five express at least some doubt (see Table 44). The percentage of shoppers who have complete confidence in food safety dropped significantly, by eight points since January 1989.

Few differences are evident within categories of shoppers:

- Compared with working women, nonworking women are more likely to have complete confidence in the safety of the food at their supermarket.
- More shoppers aged 18 to 24 and those 65 or over are completely confident than those 25 to 64.
- A larger proportion who describe their diets as relatively healthy feel that the food in their supermarket is completely safe.

When asked to volunteer specific food safety concerns (see Table 45), nearly three out of 10 shoppers (29 percent) mentioned "spoilage and germs"—a seven-point drop from the 1989 level but enough to keep this concern on top of shoppers' worry lists. About one shopper in five (19 percent) named "pesticides and residues," and slightly fewer named "improper packaging and canning" (16 percent), "chemicals" (16 percent), or "tampering" (14 percent). "Pesticides" now surpass "tampering" as the second ranked concern. The percentage who perceive "chemicals" as a hazard increased by five points, moving it from fifth to a tie for third.

Volunteered threats to food safety vary by subgroup (see Tables 45, 46). Women are more likely than men to perceive "chemicals" as a threat. Shoppers who consider their diets healthful are less likely to view "improper packaging and canning" as a threat and more likely to feel threatened by "pesticides and residues."

By region, southerners are somewhat less concerned than others about "spoilage and germs" or "chemicals." Easterners are least likely to feel that "pesticides and residues" are a threat to food safety (see Table 46).

In 1990 *Trends* continued to probe attitudes toward specific items that may be perceived as health hazards (see Table 47). Notably, residues and pesticides are perceived by far as the most serious hazard (80 percent). As in past years, antibiotics and hormones that may be used in poultry and livestock production are next (56 percent). About four out of ten shoppers believe that irradiated foods (42 percent) and nitrites in foods (37 percent) are serious hazards. Notably, concern over all items held stable or declined from 1989 to 1990.

Examining changes in the proportions who rate each item as a serious hazard, fewer shoppers in 1990 than in 1989 rate as serious "antibiotics and hormones," "nitrites" and "artificial coloring." The proportion who rate "residues" and "additives and preservatives" as a serious hazard declined by two and four percentage points, respectively.

Factors for Food Selection

Shoppers continue to express strong concern about food safety (see Table 43). Nine shoppers in 10 rated safety as a somewhat or very important factor when shopping for food (91 percent). Just over seven in 10 view safety as very important—down three percentage points from 1989.

Shopper attitudes toward food safety vary by subgroup and are generally consistent with the differences noted in 1989. Most prominent among these are:

- Women continue to be more likely than men to rate product safety as a very important factor when shopping for food.
- By age, shoppers who are 50 or over are more likely than those between 18 and 49 to view product safety as very important.
- Shoppers with no college are more likely than those with at least some college to perceive safety as a very important factor.

In contrast to 1989, when shoppers with a household member on a medically restricted diet were more likely than other shoppers to view product safety as very important, no real differences are evident in 1990.

Table 43 Importance of Product Safety in Food Selection: 1989-1990

Q.: I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important to you when you shop for food. How important is product safety?

Base: The shopping public

		Jan. 1989	Jan. 1990				
		Very Important	**Very Important**	Somewhat Important	Not Too Important	Not at All Important	Not Sure
Total	%	74	**71**	20	7	1	1
Sex							
Men	%	64	**64**	21	11	2	2
Women	%	77	**73**	20	6	1	1
Working	%	74	**66**	24	8	1	1
Nonworking	%	79	**80**	15	2	2	1
Type of Household							
With Children	%	77	**73**	19	6	1	2
No Children	%	72	**69**	21	7	2	1
Age							
18-24	%	70	**64**	25	9	3	0
25-39	%	69	**69**	22	7	1	1
40-49	%	79	**70**	18	9	2	2
50-64	%	80	**75**	19	5	0	1
65 or older	%	74	**76**	16	3	2	2
Education							
High school or less	%	76	**74**	18	6	1	1
Some college or more	%	72	**67**	23	7	2	2
Medically Restricted Diet							
Yes	%	85	**73**	20	3	1	3
No	%	71	**70**	20	8	2	1

*Less than 0.5 percent.

Table 44 Consumer Confidence in Food Safety: 1989-1990

Q.: How confident are you that the food in your supermarket is safe? Would you say you are completely confident, mostly confident, somewhat doubtful, or very doubtful?

Base: The shopping public

	Jan. 1989	**Jan. 1990**	Jan. 1990				
	Completely Or Mostly Confident	**Completely Or Mostly Confident**	Completely Confident	Mostly Confident	Somewhat Doubtful	Very Doubtful	Not Sure
Total	% 81	**79**	15	64	18	2	*
Sex							
Men	% 84	**82**	17	65	16	2	1
Women	% 80	**79**	15	64	19	3	*
Working	% 80	**80**	11	69	19	2	0
Nonworking	% 81	**78**	19	59	19	3	*
Age							
18-24	% 79	**90**	18	72	9	1	0
25-39	% 79	**81**	15	66	17	2	0
40-49	% 80	**78**	12	66	20	2	*
50-64	% 86	**78**	15	63	18	4	1
65 or older	% 80	**74**	22	52	21	4	1
Region							
East	% 77	**76**	15	61	21	2	*
Midwest	% 86	**82**	14	68	17	1	0
South	% 82	**78**	17	61	19	3	1
West	% 79	**81**	14	67	14	5	*
Description of Diet							
Healthy enough	% 84	**80**	19	61	16	3	1
Could be healthier	% 79	**79**	13	66	19	2	*

*Less than 0.5 percent.

Table 45 Perceived Threats to Food Safety, by Sex and Diet (Volunteered)

Q.: What, if anything, do you feel are the greatest threats to the safety of the food you eat?

Base: The shopping public

		Jan. 1989 Total*	**Jan. 1990 Total**	Sex		Diet	
				Men	Women	Healthy	Not
Base		772	**1,005**	401	604	360	642
Spoilage/germs	%	36	**29**	28	29	31	28
Pesticides/residues/insecticides/herbicides	%	16	**19**	18	20	22	18
Improper packaging/canning	%	17	**16**	16	16	12	18
Chemicals	%	11	**16**	13	17	14	17
Tampering	%	20	**14**	14	15	13	15
Unsanitary handling by supermarket employees	%	10	**11**	10	11	10	11
Preservatives	%	7	**8**	9	8	10	7
Additives (non-specific)	%	7	**6**	6	6	4	7
Unsanitary handling by supermarket shoppers	%	6	**4**	3	4	4	4
Pollution/environmental pollution	%	3	**4**	3	4	5	3
Processing/preparation of foods	%	4	**3**	4	3	2	3
Bugs/pests/rats	%	3	**3**	3	3	3	3
Artificial coloring	%	2	**3**	2	3	4	2
Antibiotics	%	1	**2**	2	2	3	2
Radiation	%	1	**1**	*	1	*	1
Other	%	6	**10**	10	10	12	9
None	%	2	**6**	5	6	6	5
Not sure	%	11	**12**	11	13	11	13

*In 1989 this question was asked only of those who were not completely confident that the food in their supermarket is safe. Differences may be attributable to methodology.

Table 46 Perceived Threats to Food Safety, by Region (Volunteered)

Q.: What, if anything, do you feel are the greatest threats to the safety of the food you eat?

Base: The shopping public

		Jan. 1989 Total*	**Jan. 1990 Total**	East	Midwest	South	West
Base		772	**1,005**	255	283	315	152
Spoilage/germs	%	36	**29**	30	31	26	29
Pesticides/residues/insecticides/herbicides	%	16	**19**	13	20	22	24
Improper packaging/canning	%	17	**16**	18	14	15	18
Chemicals	%	11	**16**	19	16	13	18
Tampering	%	20	**14**	17	14	13	16
Unsanitary handling by supermarket employees	%	10	**11**	10	13	9	13
Preservatives	%	7	**8**	9	7	8	10
Additives (non-specific)	%	7	**6**	6	8	5	5
Unsanitary handling by supermarket shoppers	%	6	**4**	5	3	3	6
Pollution/environmental pollution	%	3	**4**	7	2	2	4
Processing/preparation of foods	%	4	**3**	4	3	2	4
Bugs/pests/rats	%	3	**3**	2	5	3	4
Artificial coloring	%	2	**3**	3	4	2	2
Antibiotics	%	1	**2**	3	1	2	3
Radiation	%	1	**1**	0	1	1	3
Other	%	6	**10**	9	10	11	9
None	%	2	**6**	4	7	6	5
Not sure	%	11	**12**	12	12	13	12

*In 1989 this question was asked only of those who were not completely confident that the food in their supermarket is safe. Differences may be attributable to methodology.

Table 47 Consumer Concern About Selected Food Attributes: 1984-1990

Q.: I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all?

Base: The shopping public

		Serious Hazard						1990			
		Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987*	Jan. 1988**	Jan. 1989	**Serious Hazard**	Some-thing of a Hazard	Not a Hazard At All	Not Sure
Residues, such as pesticides and herbicides	%	77	73	75	76	75	82	**80**	17	2	1
Antibiotics and hormones in poultry and livestock	%	x	x	x	61	61	61	**56**	33	6	4
Irradiated foods	%	x	x	37	43	36	42	**42**	29	11	18
Nitrites in food	%	x	x	x	38	44	44	**37**	44	7	13
Additives and preservatives	%	32	36	33	36	29	30	**26**	62	9	3
Artificial coloring	%	26	28	26	24	21	28	**21**	53	24	2

x = Not asked.

*Split sample; bases = 498 and 509.

**Split sample; bases = 508 and 511.

May not add to 100 percent due to rounding.

Responsibility for Food Safety

In 1990, shoppers place less reliance on themselves to ensure that the products they buy are safe, and place more on government and manufacturers (see Table 48). Although shoppers still consider themselves primarily responsible, between 1989 and 1990 the percentage relying on themselves dropped by six points. At the same time, the proportion who rely on manufacturers increased from 14 percent to 19 percent, and the percentage who rely on government increased by four points (from 23 percent to 27 percent). After dropping significantly from 1988 to 1989, the proportion of shoppers who rely on consumer organizations remained at 7 percent. About one out of 10 shoppers continue to believe that responsibility lies with the retailer.

Shoppers' expectations of actions that supermarkets may take to enhance their confidence in food safety have changed over the past year (see Table 49). When asked how supermarkets could enhance confidence in food safety, about one shopper in five (19 percent) names "safety inspections." Another 15 percent mention "proper handling." Mention of both these strategies increased significantly since 1989 and is in direct contrast to 1989, when 20 percent were unsure of how supermarkets could instill greater confidence. Only 14 percent report such uncertainty in 1990.

Like last year, other strategies mentioned by more than one in 10 shoppers include "removal of spoiled items," "cleanliness standards for employees" and "compliance with government standards."

For the first time, *Trends* asked shoppers how the government could enhance confidence in food safety (see Table 50). As is the case with supermarkets, shoppers indicate that government could do so via safety inspections (42 percent). Another three out of 10 look to the government to enforce current standards (31 percent). To a lesser extent, shoppers would like to see government establish standards for manufacturers (16 percent), and tougher guidelines for the use of pesticides and hormones (11 percent). Notably, pesticides and hormones are among the items shoppers consider to be serious hazards (see Tables 45, 47).

Also for the first time, *Trends* asked shoppers what, if anything, they do at home to ensure food safety (see Table 51). Nearly six out of 10 shoppers rely on proper refrigeration (58 percent). Other safety-enhancing steps taken by at least one out of five shoppers include:

- Proper storage (35 percent).
- Checking expiration dates/shelf life (26 percent).
- Wash and clean foods properly (25 percent).
- Cook properly (22 percent).
- Wrap food properly (20 percent).

Table 48

Those on Whom Shoppers Rely to Ensure That the Products They Buy Are Safe

Q.: As far as you personally are concerned, whom do you rely on most to be sure that the products you buy are safe: the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?

Base: The shopping public

	Total							
	1983	1984	1985	1986	1987**	1988***	1989	**1990**
	%	%	%	%	%	%	%	**%**
Yourself as an individual	46	48	38	48	45	45	41	**35**
Government	27	25	37	33	28	29	23	**27**
Federal	24	22	31	29	25	26	20	**22**
State	3	3	6	4	3	3	3	**6**
Manufacturers	13	11	7	8	9	7	14	**19**
Retailers	5	5	6	2	5	3	10	**9**
Consumer organizations	6	9	8	9	15	15	8	**7**
Other	*	1	1	*	1	1	1	**2**
None	1	*	1	*	*	*	*	**1**
Not sure	2	1	2	*	2	2	2	**1**

*Less than 0.5 percent.

**Split sample; base = 498. ***Split sample; base = 511.

May not add to 100 percent due to rounding.

Table 49 How Supermarkets Could Enhance Shopper Confidence in Food Safety (Volunteered)

Q.: What, if anything, do you expect your supermarket to do to make you confident that the food they sell is safe?

Base: The shopping public

		Jan. 1989 Total	**Jan. 1990 Total**
Base		1,031	**491****
Safety inspections	%	13	**19**
Proper handling	%	9	**15**
Not sure	%	22	**14**
Remove spoiled items	%	14	**14**
Cleanliness standards for employees	%	13	**14**
Comply with government safety standards	%	11	**11**
Origin of food items/where food comes from	%	7	**10**
Proper refrigeration	%	7	**9**
Recall/remove items judged to be hazardous	%	8	**7**
Freshness of food/expiration date	%	10	**4**
Testing produce for pesticide residues	%	3	**4**
Clear labeling	%	6	**3**
Store's reputation/integrity	%	4	**3**
Information on food/pamphlets	%	4	**3**
Monitoring of bulk food and salad bar areas	%	1	**2**
Dress codes for employees	%	2	*
Other	%	8	**13**
Nothing	%	8	**10**

*Denotes less than 0.5 percent.

**Split sample.

Table 50 How Government Could Enhance Shopper Confidence in Food Safety (Volunteered)

Q.: What, if anything, do you expect the government to do to make you confident that the food your supermarket sells is safe?

Base: The shopping public

		Jan. 1990 Total
Base		514*
Safety inspections	%	42
Enforce government safety standards	%	31
Establish standards for manufacturers	%	16
Establish tougher guidelines/standards for the use of pesticides/hormones	%	11
Establish standards for retailers/supermarkets	%	5
Ban use of pesticides/hormones	%	3
Ban the production/sale of certain food items	%	3
Other	%	13
None	%	8
Not sure	%	13

*Split sample.

Table 51 Steps Taken at Home to Ensure the Safety of Food

Q.: What, if anything, do you do at home to ensure the safety of the foods that you buy?

Base: The shopping public

		Jan. 1990 Total
Base		1,005
Refrigerate properly	%	58
Store properly	%	35
Check expiration dates/watch shelf life	%	26
Wash and clean foods properly	%	25
Cook properly	%	22
Wrap food properly	%	20
Don't leave meat out	%	7
Other	%	7
Nothing	%	4
Don't know/no response	%	2

Food Safety Information

For the second time, *Trends* asked shoppers if they sought information on food safety during the past year (see Table 52). Almost half said they had (46 percent). Shoppers now take a more proactive role in seeking food safety information than in the past. The percentage who sought this information increased nine points from 1989 to 1990.

The subgroups of shoppers most likely to seek food safety information:

- Nonworking women are somewhat more likely than men.
- Shoppers aged 50 or older are somewhat more likely than other groups.
- Shoppers in the West are far more likely than those in other U.S. regions.
- Shoppers with a household member on a medically restricted diet are more likely than others.

Just as shoppers rely on government to safeguard the food supply, they would turn to government for more information about food safety (see Table 53). Nearly one shopper in three would turn to government (28 percent), up six percentage points since 1989. About 22 percent would turn to consumer organizations, while another 14 percent would rely on magazines, a library or bookstore (13 percent), or newspapers (12 percent).

Table 52 **Incidence of Seeking Information About Food Safety: 1989-1990**

Q.: In the past year, have you ever looked for information on food safety?

Base: The shopping public

		Jan. 1989	Jan. 1990 Sought Information About Food Safety		
		Yes	Yes	No	Don't Know
Total	%	37	**46**	54	1
Sex					
Men	%	40	**42**	57	1
Women	%	36	**47**	53	1
Working	%	32	**44**	55	1
Nonworking	%	41	**49**	50	1
Age					
18-24	%	32	**45**	55	0
25-39	%	37	**44**	55	1
40-49	%	35	**45**	54	1
50-64	%	36	**48**	51	1
65 or older	%	47	**46**	53	1
Region					
East	%	42	**39**	61	*
Midwest	%	31	**41**	58	1
South	%	38	**48**	51	1
West	%	37	**58**	42	*
Education					
High school or less	%	34	**44**	56	1
Some college/college graduate	%	41	**48**	52	*
Medically Restricted Diet					
Yes	%	44	**57**	43	0
No	%	35	**42**	57	1

*Less than 0.5 percent.

Table 53 **Sources of Information on Food Safety, by Education (Volunteered)***

Q.: If you wanted to have more information about food safety, to what sources would you turn?

Base: The shopping public

		Jan. 1989 Total	**Jan. 1990 Total**	Education	
				High School Or Less	Some College/ College Grad
Base		1,031	**1,005**	516	484
Government	%	22	**28**	23	35
Federal	%	18	**19**	15	24
State	%	7	**9**	9	10
Consumer organizations	%	21	**22**	17	27
Magazines	%	15	**14**	12	17
Library/book store	%	14	**13**	10	17
Newspapers	%	14	**12**	10	13
Retailers/supermarkets/stores	%	8	**10**	12	8
Radio/television	%	7	**6**	5	6
Manufacturers	%	5	**5**	5	5
Medical profession	%	5	**4**	4	5
Friends/associates	%	3	**3**	2	3
Other	%	9	**5**	4	5
None	%	1	**4**	5	2
Not sure	%	19	**15**	21	8

*Multiple responses accepted.

CHAPTER 7

A Decade in Retrospect

At the start of the 1980s, the overriding theme was economics. Consumers were struggling to balance their budgets while faced with the mounting pressures of inflation, energy shortages and time constraints. *Trends* devoted considerable discussion to consumers' general economic outlook, their methods of economizing (e.g., use of coupons), and their propensity for activism (e.g., boycotting, petitioning, etc.) in response to their economic frustrations. Perceptions of supermarkets were discussed, in part, in terms of their profits.

In 1980 *Trends* reported . . . .

> "The big villain in the consumer's mind and the major focus of their wrath is gasoline. At least for the time being, outrage at gasoline prices has taken the heat off of rising food prices, but there are signs that this situation could change and that the marketplace needs reconfirmation that the industry is doing the best possible job of providing the increasingly price-sensitive consumer with the best value for the dollar."

As we enter the 1990s, economics are still important to shoppers, but the dominant themes are now nutrition, product safety and convenience.

Consumer expectations of supermarkets have not changed much since 1980. Then and now, shoppers' primary expectations are that supermarkets provide quality products at good prices in a pleasing environment. In 1980 and in 1990, consumers generally felt that the supermarket industry is delivering on these expectations.

What shoppers find inside their supermarkets, however, has changed markedly in 10 years. In 1980, *Trends* examined their awareness of and attitudes toward two new services: the computerized checkout and nonbrand merchandise. Today, these features are hardly new. In 1990, *Trends* examined shoppers' awareness and use of video rentals, bank machines, microwave products, carryout foods and postage stamps. Whereas the 1980 study focused on shoppers' use of fast-food restaurants, today the fast-food restaurant has moved inside the supermarket.

The supermarket continues to mirror lifestyles in America. As shopper demographics and attitudes continue to change, the supermarket industry evolves to meet the needs and wants of local customers. This research report provides a living history of how the industry and its consumers shape each other to maintain the world's most efficient and responsive food distribution system.

METHODOLOGY

Selection of the Sample

The data for this survey were collected from 1,005 telephone interviews conducted in January 1990. Households contacted for the survey were selected by a procedure known as random digit dialing (RDD). This procedure ensures the inclusion of individuals with unlisted or not yet listed telephone numbers, as well as those with listed numbers, and thus closely approximates the total U.S. population.

Each household selected was screened by the following three criteria:

- Male or female head of household.
- Having primary or equally shared responsibility for food shopping.
- Having shopped for groceries in the past two weeks.

The sample was controlled to consist of 60 percent female heads of households and 40 percent male heads of households in order to increase the reliability of the male shopper sample. The sample was then weighted to an 80 percent female/20 percent male ratio to maintain comparability with previous studies in the *Trends* series. Aside from this stratification and weighting by sex, the sample is a nationwide cross section of shoppers. Therefore, all subpopulation percentages are projectable to the U.S. shopping public as a whole. A profile of the total sample is shown in Table 54.

Sampling Error

It is important to note that all survey results are subject to sampling error, i.e., the difference between obtained results and those that would be obtained by studying the entire population. The size of this error varies with the size of the sample and with the percentage of respondents giving a particular answer. Table 55 shows the range of error for samples of four different sizes and at different percentages of response.

This table can be used to determine the approximate sampling errors associated with results presented in this report. An example illustrates this process:

As shown in Table 7 of this report, 39 percent of those surveyed this year spend $61 to $100 each week on groceries for their families. This percentage is based on the total sample of 1,005 shoppers. From the table below, the sampling error associated with a 40 percent response for a sample of 1,000 is plus or minus 3.0 percentage points. If one applies this sampling error to the 39 percent response in Table 7, the true proportion of shoppers who spend $61 to $100 a week should be no less than 36 percent and no more than 42 percent.

Aside from knowing the sampling error of any given finding, one may also like to know whether the differences among certain percentage figures are a likely result of sample variation or due to real differences in the shopping population. For example, in Table 11 there is a seven-point difference between the percentage of working women who look in the newspaper for grocery specials pretty much every time they shop and the percentage of nonworking women who do this. Although this seven-point difference seems sizeable, it could be due to sampling error. To determine whether this is a true difference, one needs to consider the number of people responding to each question, as well as the particular percentages reported. In general, the larger the sample sizes, the less likely a reported difference will be due to sampling error.

In Table 56, the minimum percentage difference that must occur to be considered real is shown for varying sample sizes and varying percent responses.

In the previous example from Table 11, 312 working women were asked how often they look in the newspaper for grocery specials when they shop, of whom 37 percent said "pretty much every time." A total of 291 nonworking women were asked the same question, and 44 percent said "pretty much every time." Both sample sizes are closest to the 300 sample-size row of the table. The two percentages are closest to the 40 percent or 60 percent column. From the table, the minimum difference between percentages that would not be due to sampling error is 8 points. Because the difference between 37 percent and 44 percent does not exceed this minimum, one must assume that the observed difference between working women and nonworking women falls within the range of sampling error.

Table 54 **Demographic Profile of Supermarket Shoppers: 1990**

Base: The shopping public

	Number In Sample	Unweighted Percentage In Sample	Weighted Percentage In Sample
		%	%
Total	1,005	100	100
Sex			
Men	401	40	20
Women	604	60	80
Working	312	31	41
Nonworking	291	29	39
Type of Household			
With children	422	42	44
No children	582	58	56
Age			
18-24	75	7	7
25-39	383	38	38
40-49	205	20	20
50-64	181	18	18
65 and over	149	15	15
Income			
$15,000 or less	185	18	20
$15,001 to $25,000	206	20	21
$25,001 to $35,000	196	20	19
$35,001 to $50,000	190	19	18
$50,001 or more	151	15	14
Marital Status			
Single/separated/divorced/widowed	332	33	32
Married	670	67	68
Education			
High school or less	516	51	53
Some college/college grad	484	48	46
Size of Place			
Metropolitan			
1 million or over	364	36	35
Under 1 million	373	37	37
Nonmetropolitan	268	27	27
Medically Restricted Diet			
Yes	198	20	22
No	806	80	78
*Region**			
East	255	25	25
Midwest	283	28	28
South	315	31	33
West	152	15	15

**East includes* Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont and West Virginia.

Midwest includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.

South includes Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas and Virginia.

West includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming.

Note: Percentages may add up to less than 100 percent as a result of nonresponse.

Table 55 Sampling Error (+/-) at 95 Percent Confidence Level for Samples of Four Different Sizes

Percentage Response	Size of Sample 1,000	600	400	100
	%	%	%	%
10(90)	1.9	2.4	2.9	5.9
20(80)	2.5	3.2	3.9	7.8
30(70)	2.8	3.7	4.5	9.0
40(60)	3.0	3.9	4.8	9.6
50(50)	3.1	4.0	4.9	9.8

Table 56 Sampling Error of Difference Between Proportions

Sampling Tolerances (at 95% Confidence Level) to Use in Evaluating Differences Between Two Percentage Results

Approximate Sample Size Of Two Groups Asked Question On Which Survey Results Are Based		Survey Percentage Results at 10% or 90%	Survey Percentage Results at 20% or 80%	Survey Percentage Results at 30% or 70%	Survey Percentage Results at 40% or 60%	Survey Percentage Results at 50%
1,000 vs.	1,000	3	4	4	4	4
	500	3	4	5	5	5
	300	4	5	6	6	6
	200	5	6	7	7	8
	100	6	8	9	10	10
500 vs.	500	4	4	6	6	6
	300	4	6	7	7	7
	200	6	7	8	8	8
	100	7	9	10	11	11
300 vs.	300	5	6	7	8	8
	200	5	7	8	9	9
	100	7	9	10	11	11
200 vs.	200	6	8	9	10	10
	100	7	10	11	12	12
100 vs.	100	8	11	13	14	14

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